ICE CMII ECR Process and Workflow Tasks (by role)

Task	Workflow Task	Submitter	Evaluator	Organization Leader	Change Admin I	Screener	Reviewer	Reviewer Chair
Initiate ECR from Product Folders page		X						
Complete "Create ECR" attributes		X						
Add Affected Data to ECR (if required)		X						
Add Attachments to ECR (if required)		X						
	"Submit ECR" Workflow Task	X						
	"Receipt and Release" Workflow Task		X					
	"ECR Submittal Approval Confirmation" Workflow Task			X	X			
	"Rework ECR" Workflow Task	X						
	"Choose Track" Workflow Task		X			X		
	"Assign Reviewers and Reviewer Chair" Workflow Task				X			
	"Review Document" Workflow Task						X	

Click the "X" for details on completing this task.
Use the "Back" button on the Web toolbar to return to previous location in this document.

Task	Workflow Task	Submitter	Evaluator	Organization Leader	Change Admin I	Screener	Reviewer	Reviewer Chair
	"Collect and Summarize Comments" Workflow Task	X			X			
	"Conduct CRB Review" Workflow Task							X
	"Update Change Package" Workflow Task				X			
	"Prepare for Implementation" Workflow Task				X			

Click the "X" for details on completing this task.
Use the "Back" button on the Web toolbar to return to previous location in this document.

ECN Process and Workflow Tasks (by role)

Task	Workflow Task	Change Admin II	Evaluator	Organization Administrator	Approver	Approver Chair	ECR Author	Author	Designated User	Change Admin III
Create ECN from ECR Details page		X								
Complete “Create ECN” attributes		X								
Add Associated ECRs to ECN (if required)		X								
Add Attachments to ECN (if required)		X								
Add tasks to the ECN Implementation Plan		X								
	“Submit ECN” Workflow Task	X								
	“Receipt and Release” Workflow Task		X							
	“Rework ECN” Workflow Task	X								
	“Secretariat Review” Workflow Task			X						
	“Assign Approvers and Chair” Workflow Task	X								

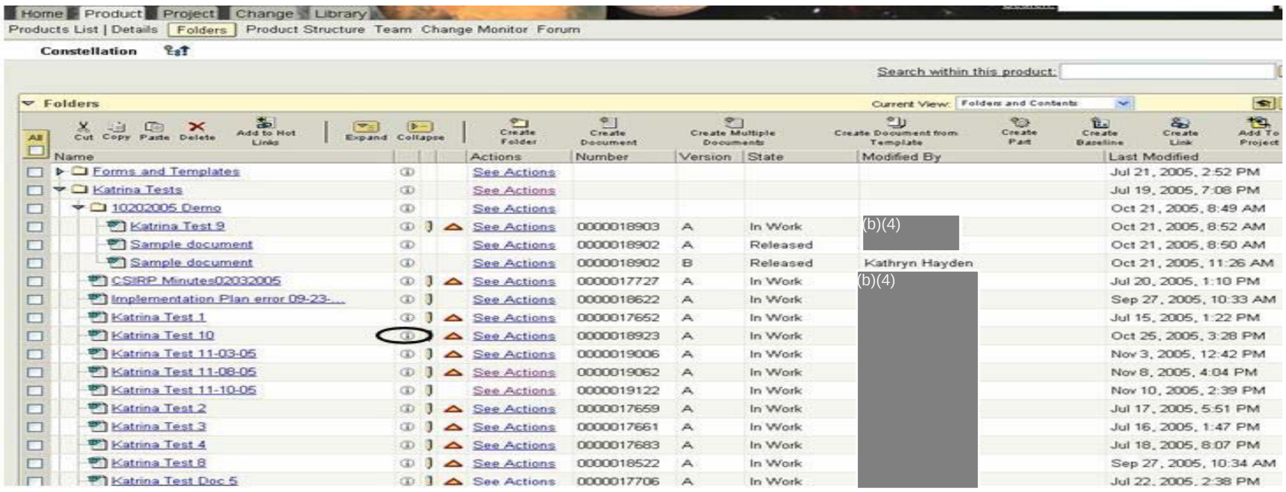
Click the “X” for details on completing this task.
Use the “Back” button on the Web toolbar to return to previous location in this document.

Task	Workflow Task	Change Admin II	Evaluator	Organization Administrator	Approver	Approver Chair	ECR Author	Author	Designated User	Change Admin III
	"ECR Disposition Concurrence" Workflow Task				X					
	"Conduct CIB Review" Workflow Task					X				
	"Amend ECN Plan" Workflow Task	X					X			
	"Update ECN and Implementation Plan" Workflow Task	X								
	"Complete ECN Task" Workflow Task							X		
	"Review ECN Task" Workflow Task								X	
	"Rework ECN Task" Workflow Task							X		
	"Release Data" Workflow Task		X							
	"Audit ECN" Workflow Task									X

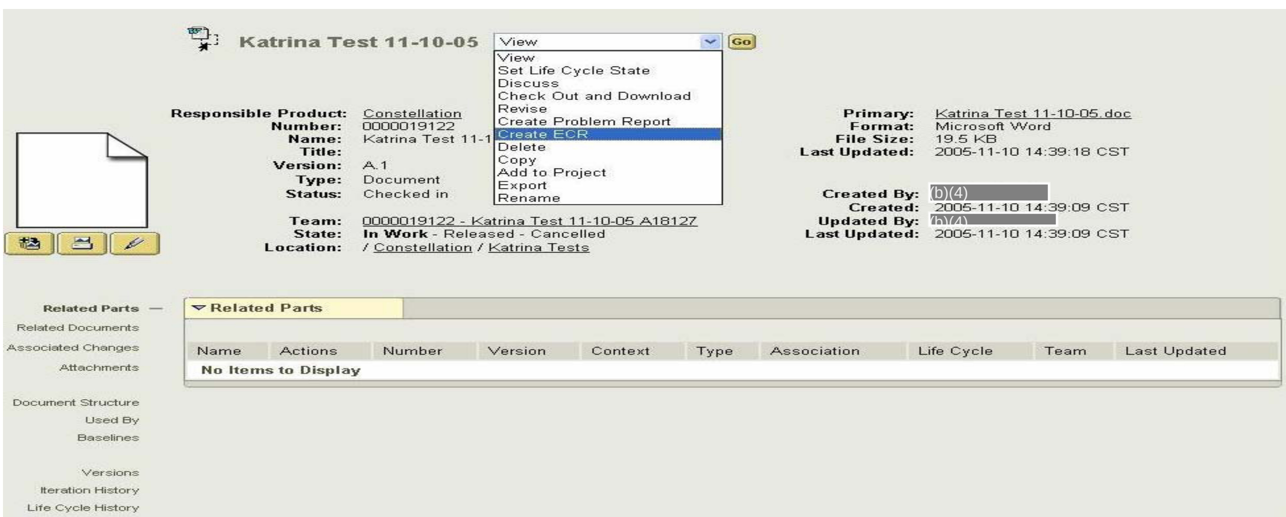
Click the "X" for details on completing this task.
Use the "Back" button on the Web toolbar to return to previous location in this document.

Initiate ECR from Product Folders page

From the Product/Folders tab in Windchill, select the Details page for the document by clicking the circled "i" icon next to the document link.



Choose "Create ECR" from the pulldown menu at the top of the Details page and click the "**Go**" button

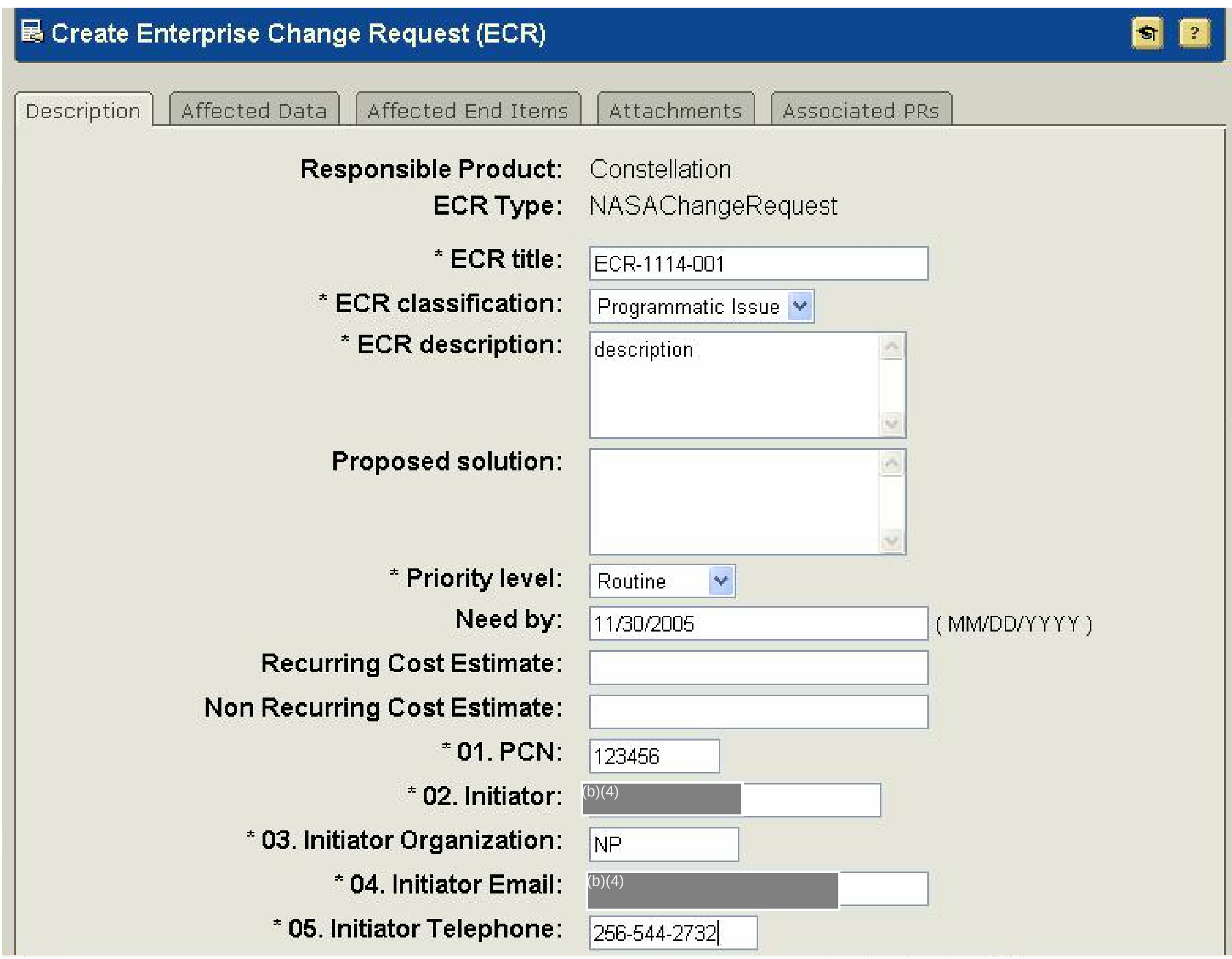


Return to ECR Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

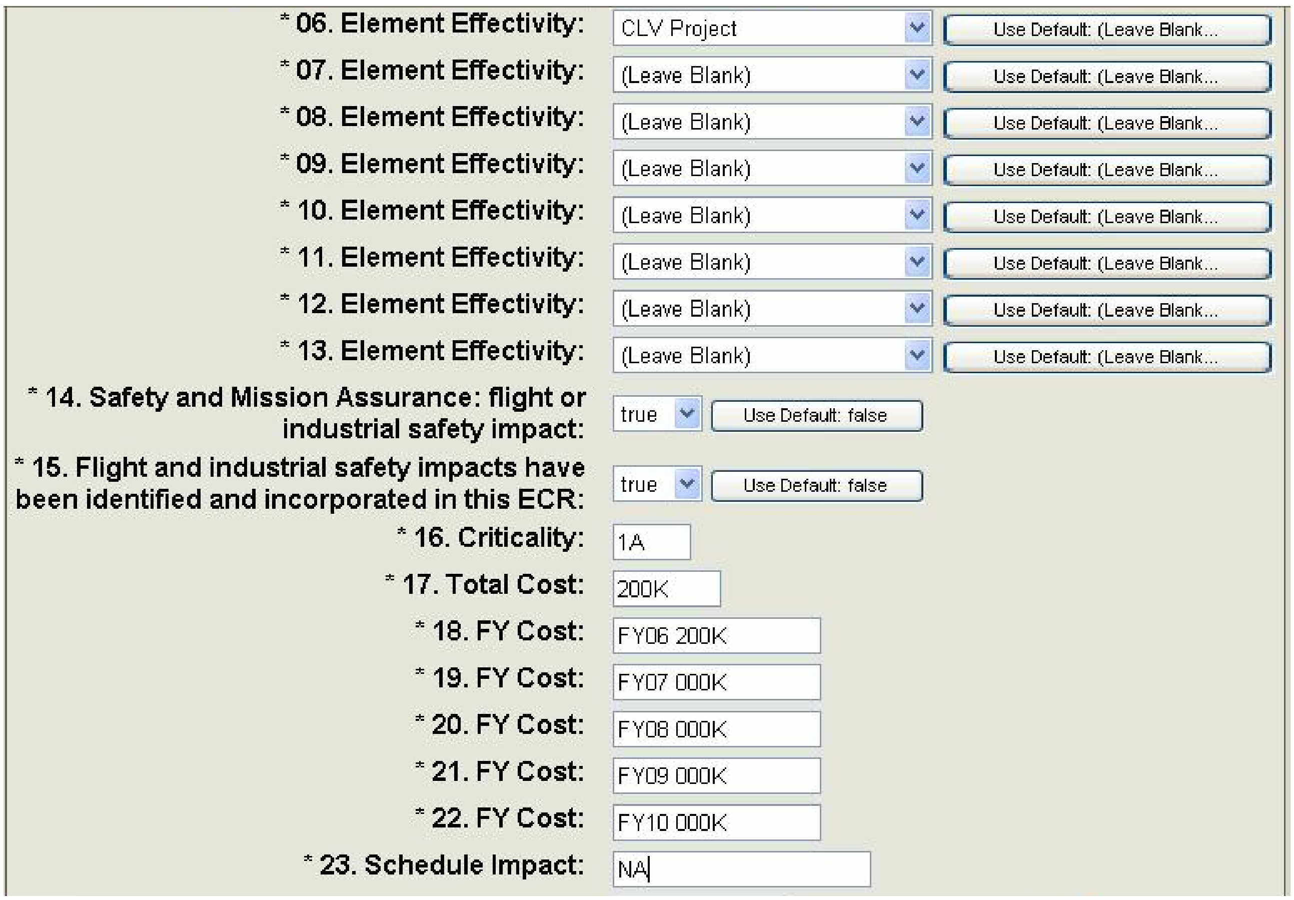
Complete "Create ECR" screen inputs

On the Description tab of the "Create ECR" window, enter the following information:
ECR Title
ECR Classification: choose Programmatic Issue or Technical Issue
ECR Description
Proposed Solution
Priority Level: choose Routine, Urgent or Emergency
Need by date
Recurring Cost Estimate
Non Recurring Cost Estimate
PCN [Number]
Initiator
Initiator Organization
Initiator Email
Initiator Telephone
NOTE: Do not click the yellow "OK" button until all ECR fields are completed; use "NA" or "TBD" for fields that are not applicable or available. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.



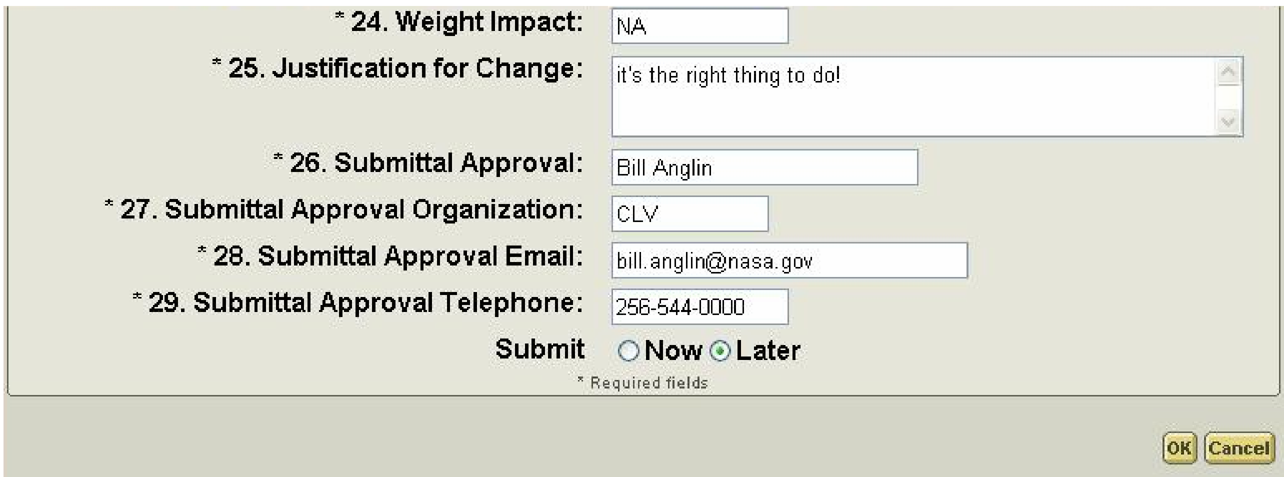
Use the "Back" button on the Web toolbar to return to previous location in this document.

Further down on the Description tab of the "Create ECR" window, enter the following information:
Element Effectivity (select entry from pull-down menu; one per box; click "Use Default (Leave Blank)" button for any unused blocks)
Safety and Mission Assurance: flight or industrial safety impact: choose one
"**True**" if there are flight or industrial safety impacts for this ECR
"**False**" if there are NO flight or industrial safety impacts for this ECR
Flight and industrial safety impacts have been identified and incorporated in this ECR: choose one
"**True**" if flight or industrial safety impacts have been identified/incorporated in this ECR
"**False**" if flight or industrial safety impacts have NOT been identified/incorporated in this ECR
Criticality: Provide 2-digit code (only if flight/safety impacts in this ECR). If not applicable, enter "NA"
Total Cost: Enter in this format "9999K" or "9999M"
FY Cost: Use one block for each FY, in this format "FY99 9999K" or "FY99 9999M". Enter "NA" in unused blocks.
Schedule Impact: Enter text or "NA" (if not applicable)
NOTE: Do not click the yellow "OK" button until all ECR fields are completed; use "NA" or "TBD" for fields that are not applicable or available. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.



Use the "Back" button on the Web toolbar to return to previous location in this document.

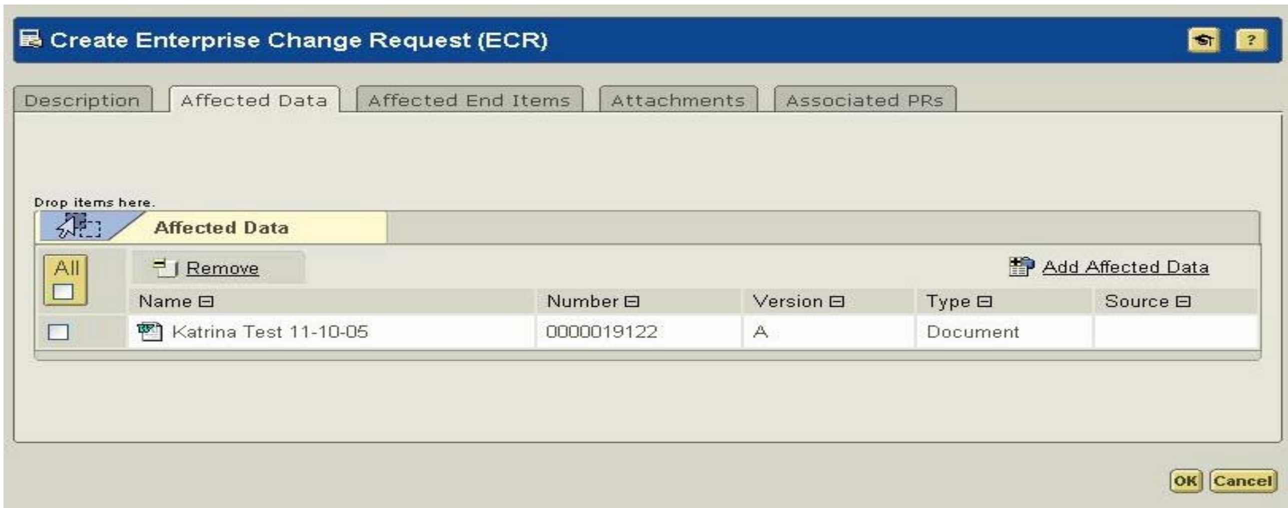
Further down on the Description tab of the "Create ECR" window, enter the following information:
Weight Impact: Enter text or "NA" (if not applicable)
Justification for Change: Enter text
Submittal Approval: Enter name of person approving the Initiator's submittal of this ECR
Submittal Approval Organization:
Submittal Approval Email:
Submittal Approval Telephone
Choose **Submit** "**Now**" or "**Later**"
NOTE: Do not click the yellow "OK" button until all ECR fields are completed; use "NA" or "TBD" for fields that are not applicable or available. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.



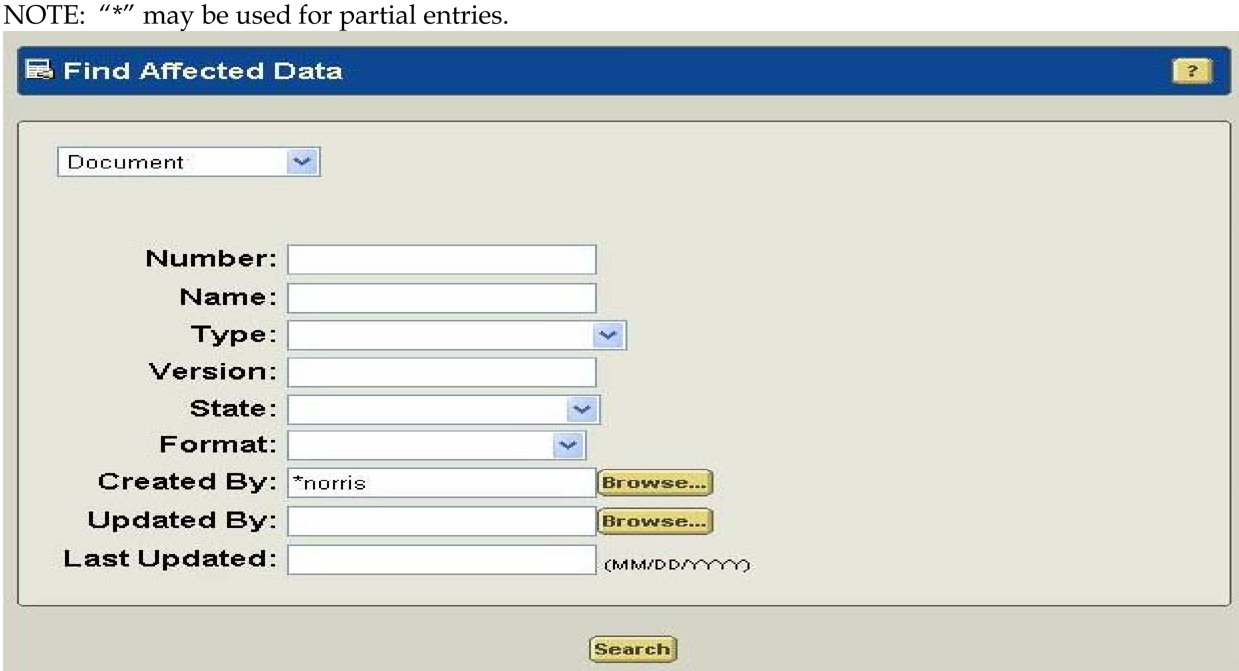
[Return to ECR Process Matrix]

Add Affected Data to ECR (if required)

Click the "Affected Data" tab on the "Create ECR" screen. The document for which the ECR has been created will appear in the "Affected Data" window. To add any other documents affected by this ECR, click "Add Affected Data" and search for the document using the fields on the "Find Affected Data" window. **NOTE: Do not click the yellow "OK" button until all available affected data/attachments have been added to the ECR. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.**



Enter search criteria in one or more fields in this window and click the "**Search**" button.
NOTE: "*" may be used for partial entries.



Use the "Back" button on the Web toolbar to return to previous location in this document.

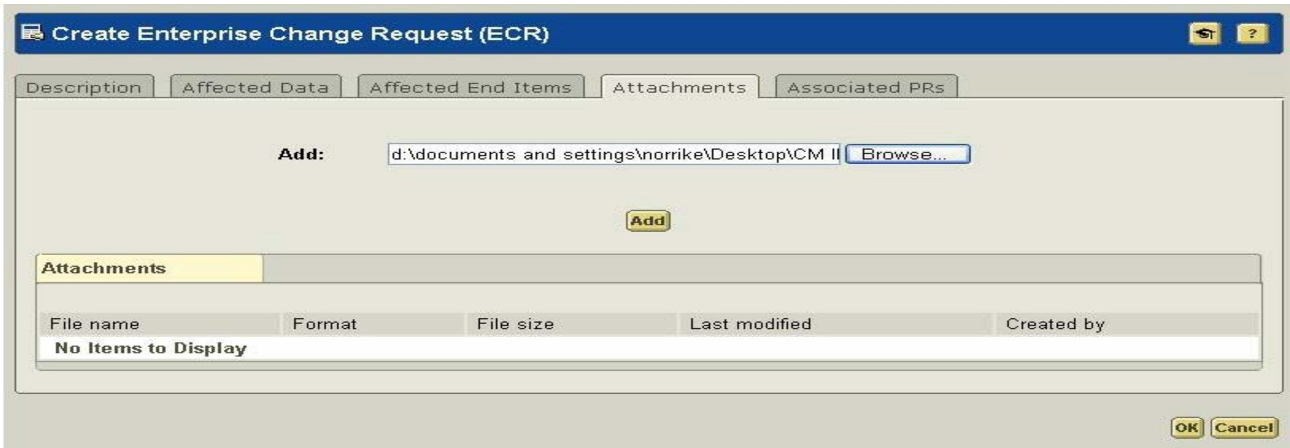
Select the affected data from the "Search Results" window by checking the box next to each document. Click the "**Add Selected Items**" button at the bottom of the window.

Return to ECR Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

Add Attachments to ECR (if required

Click the "Attachments" tab to add any attachments to the ECR.
Click the "**Browse**" button and browse to the relevant file, then click the "**Add**" button.
NOTE: Do not click the yellow "OK" button until all available affected data/attachments have been added to the ECR. Choose "Submit Later" to allow for updates to the ECR before submitting to the Receipt and Release Desk.



Repeat this procedure for each file to be attached.

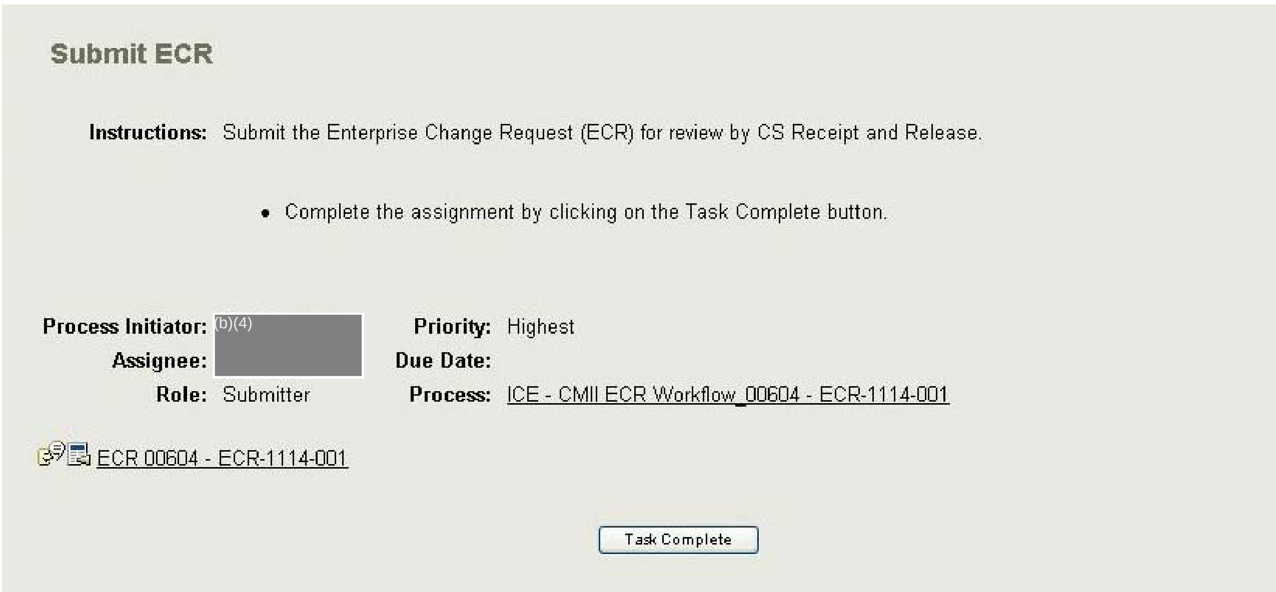
[Return to ECR Process Matrix]

"Submit ECR" Workflow Task

Responsible Role: Submitter

If ECR updates are required, click the ECR link to access the ECR's Details page and make updates. See "Updating ECR from ECR Details Page" for detailed instructions.

Click the "**Task Complete**" button when the ECR is complete ready for submittal to the Receipt and Release Desk.



Return to ECR Process Matrix

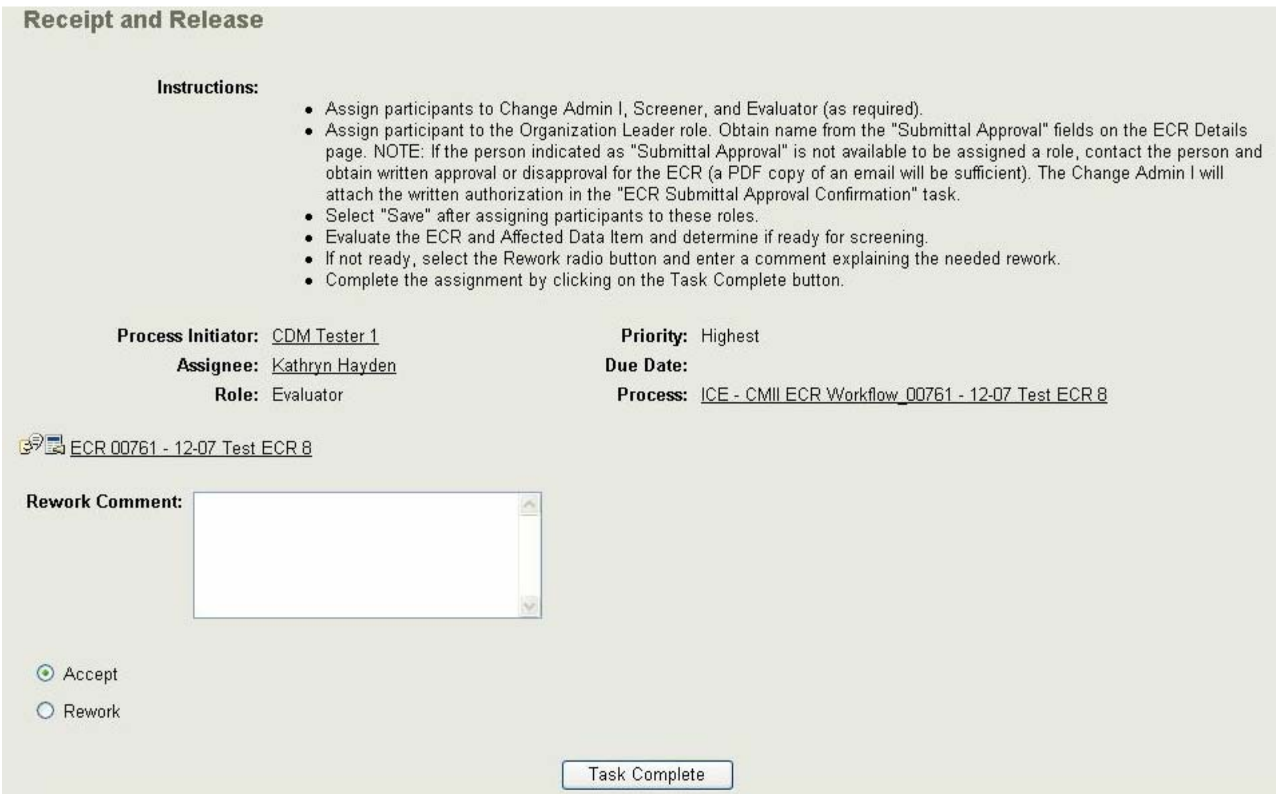
"Receipt and Release" Workflow Task

Responsible Role: Evaluator

Review the ECR and determine if it is ready for processing. Make role/participant assignments and record accept/rework vote per task instructions. See "Assigning Roles to Participants in Workflow Tasks" for detailed instructions.

Windchill Role	Process Role
Change Admin I	Change Package Manager
Screener	Screening Group Chair
Evaluator	Receipt and Release Desk
Organization Leader	Submittal Approval contact/authority

Click the "**Task Complete**" button after all role/participant assignments and accept/rework vote have been recorded.



Return to ECR Process Matrix

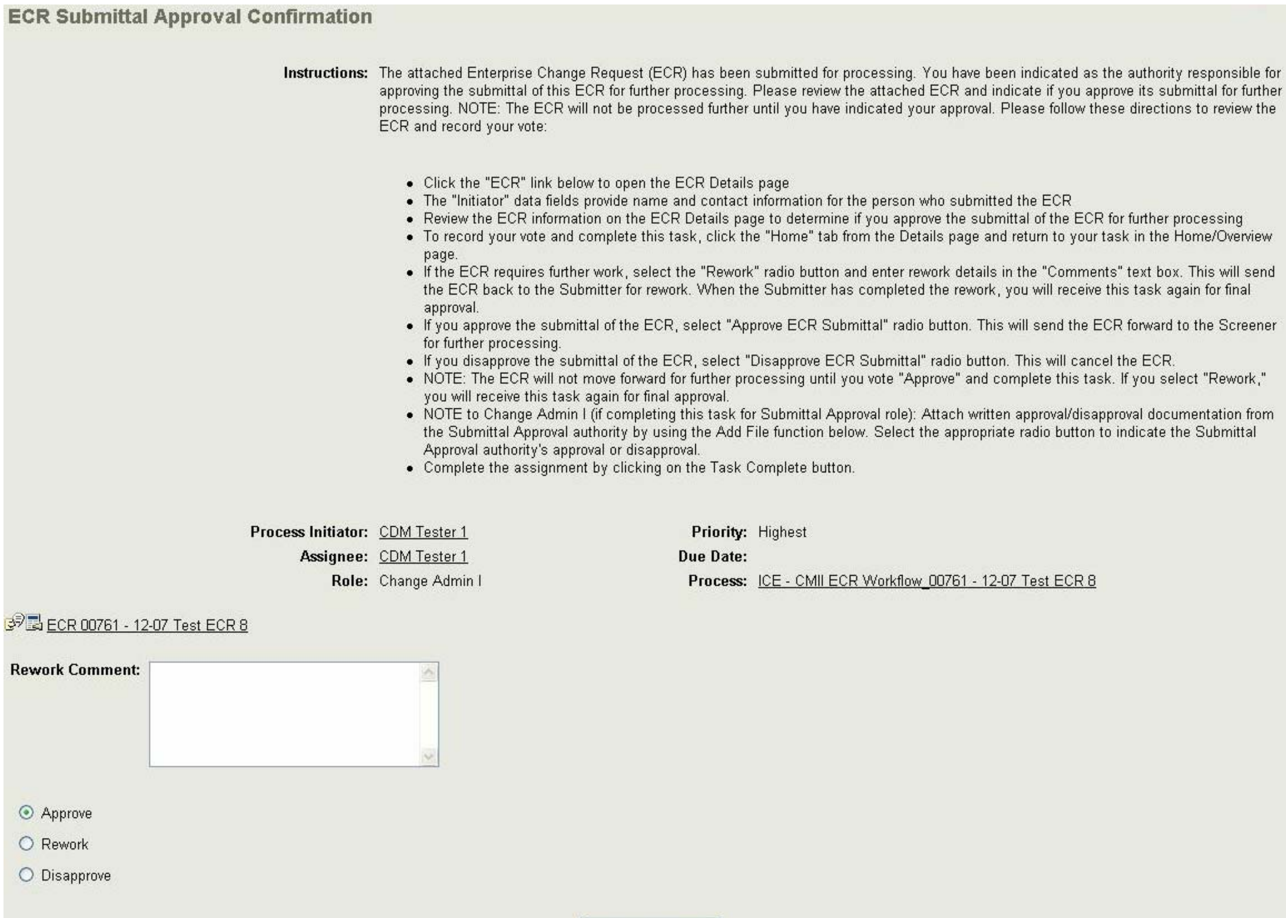
Use the "Back" button on the Web toolbar to return to previous location in this document.

"ECR Submittal Approval Confirmation" Workflow Task

Responsible Role: Organization Leader*
*NOTE: Change Admin I also receives this task

Review the ECR and determine if it should be submitted for further processing or if rework is required.

Click the "**Task Complete**" button after completing the tasks detailed in the task instructions.



ECR Submittal Approval Confirmation

Instructions: The attached Enterprise Change Request (ECR) has been submitted for processing. You have been indicated as the authority responsible for approving the submittal of this ECR for further processing. Please review the attached ECR and indicate if you approve its submittal for further processing. NOTE: The ECR will not be processed further until you have indicated your approval. Please follow these directions to review the ECR and record your vote:

- Click the "ECR" link below to open the ECR Details page
- The "Initiator" data fields provide name and contact information for the person who submitted the ECR
- Review the ECR information on the ECR Details page to determine if you approve the submittal of the ECR for further processing
- To record your vote and complete this task, click the "Home" tab from the Details page and return to your task in the Home/Overview page.
- If the ECR requires further work, select the "Rework" radio button and enter rework details in the "Comments" text box. This will send the ECR back to the Submitter for rework. When the Submitter has completed the rework, you will receive this task again for final approval.
- If you approve the submittal of the ECR, select "Approve ECR Submittal" radio button. This will send the ECR forward to the Screener for further processing.
- If you disapprove the submittal of the ECR, select "Disapprove ECR Submittal" radio button. This will cancel the ECR.
- NOTE: The ECR will not move forward for further processing until you vote "Approve" and complete this task. If you select "Rework," you will receive this task again for final approval.
- NOTE to Change Admin I (if completing this task for Submittal Approval role): Attach written approval/disapproval documentation from the Submittal Approval authority by using the Add File function below. Select the appropriate radio button to indicate the Submittal Approval authority's approval or disapproval.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1 **Priority:** Highest
Assignee: CDM Tester 1 **Due Date:**
Role: Change Admin I **Process:** ICE - CMII ECR Workflow_00761 - 12-07 Test ECR 8

ECR 00761 - 12-07 Test ECR 8

Rework Comment:

Approve
Rework
Disapprove

Task Complete

Return to ECR Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

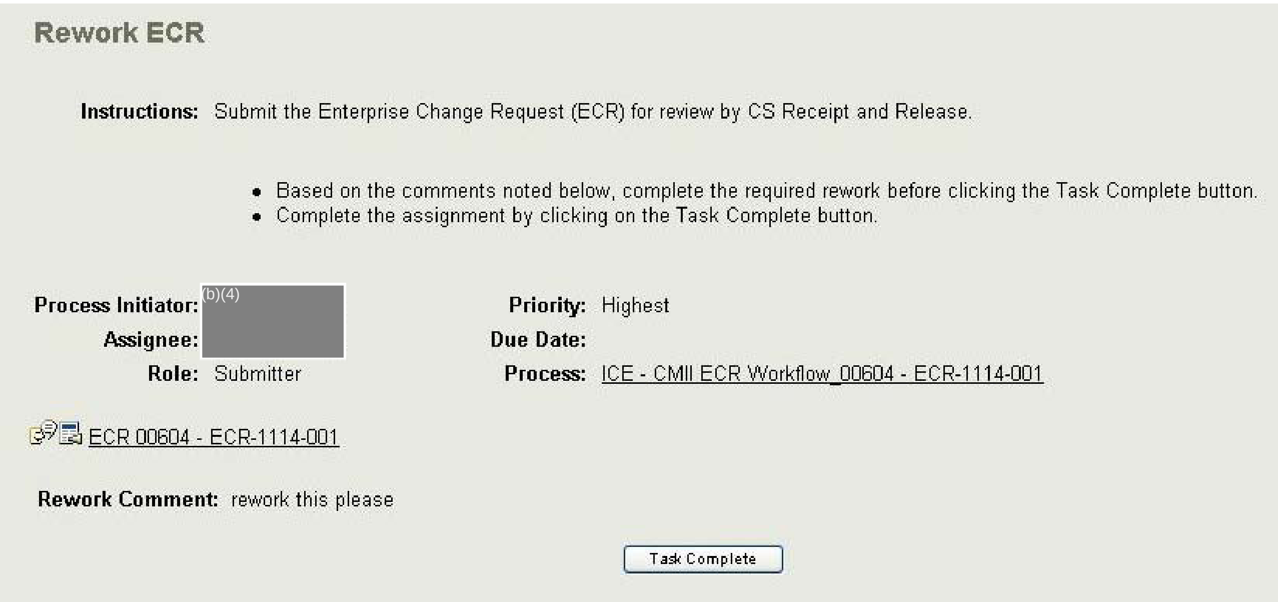
"Rework ECR" Workflow Task

Responsible Role: Submitter

"Rework" is required for this ECR, per the "Receipt and Release" or "ECR Submittal Approval Confirmation" task.

Review the Rework Comments in this task and perform the required rework. Update the ECR by clicking the ECR link in this task and following the detailed instructions in "Updating ECR from ECR Details Page."

Click the "**Task Complete**" button when rework has been completed.



Return to ECR Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

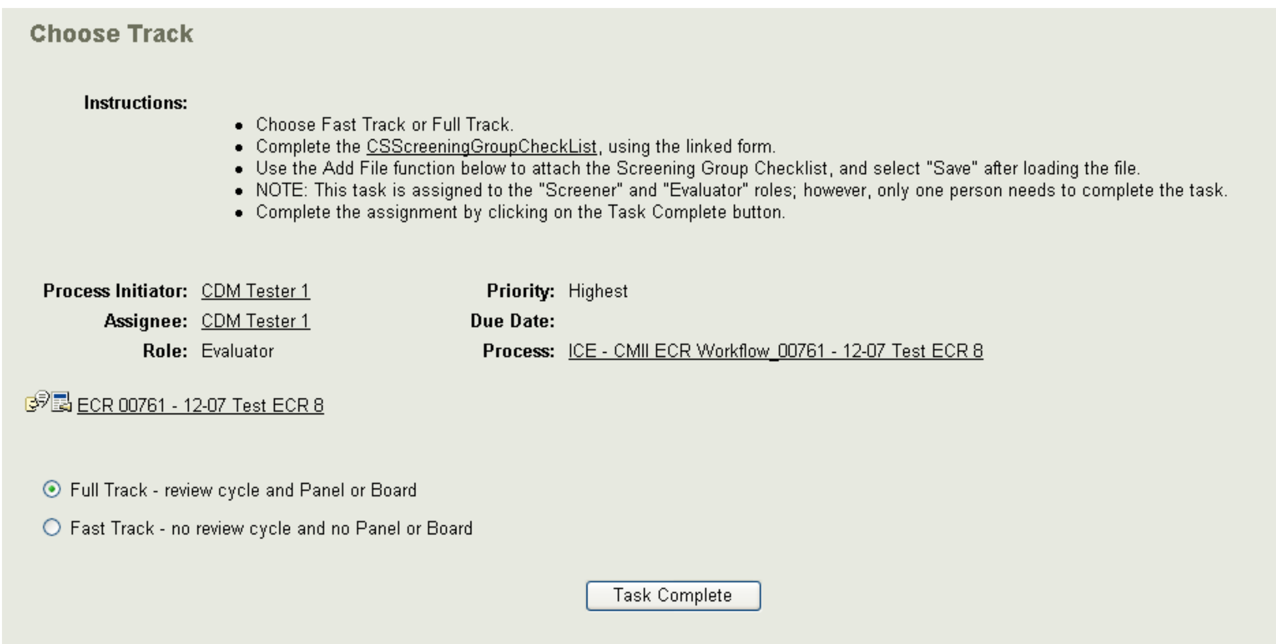
“Choose Track” Workflow Task

Responsible Role: Screener*
*NOTE: Evaluator also receives this task

Determine if this ECR will go through the Fast Track or Full Track version of the workflow. If you choose “Fast Track,” the workflow bypasses the Change Review Board comments/concurrence review and CRB Chair decision and goes directly to the “Update Change Package” task. If you choose “Full Track,” the ECR undergoes a Change Review Board (CRB) review and CRB Chair decision via the workflow.

Determine the names of the Change Review Board “Reviewers” and “Reviewer Chair,” complete the *Screening Group Checklist* form and attach the form to the workflow. See “Attaching Files into Workflow Tasks” for detailed instructions. NOTE: Multiple “Reviewers” will receive a tasks instructing them to review the ECR and provide comments before the review deadline. One “Reviewer Chair” will receive a task at the conclusion of the review to record the CRB decision.

Click the “**Task Complete**” button after choosing track and attaching file.


Choose Track

Instructions:

- Choose Fast Track or Full Track.
- Complete the CSScreeningGroupCheckList, using the linked form.
- Use the Add File function below to attach the Screening Group Checklist, and select "Save" after loading the file.
- NOTE: This task is assigned to the "Screener" and "Evaluator" roles; however, only one person needs to complete the task.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: CDM Tester 1
Assignee: CDM Tester 1
Role: Evaluator
Priority: Highest
Due Date:
Process: ICE - CMII ECR Workflow_00761 - 12-07 Test ECR 8

ECR 00761 - 12-07 Test ECR 8

Full Track - review cycle and Panel or Board
Fast Track - no review cycle and no Panel or Board

Task Complete

Return to ECR Process Matrix

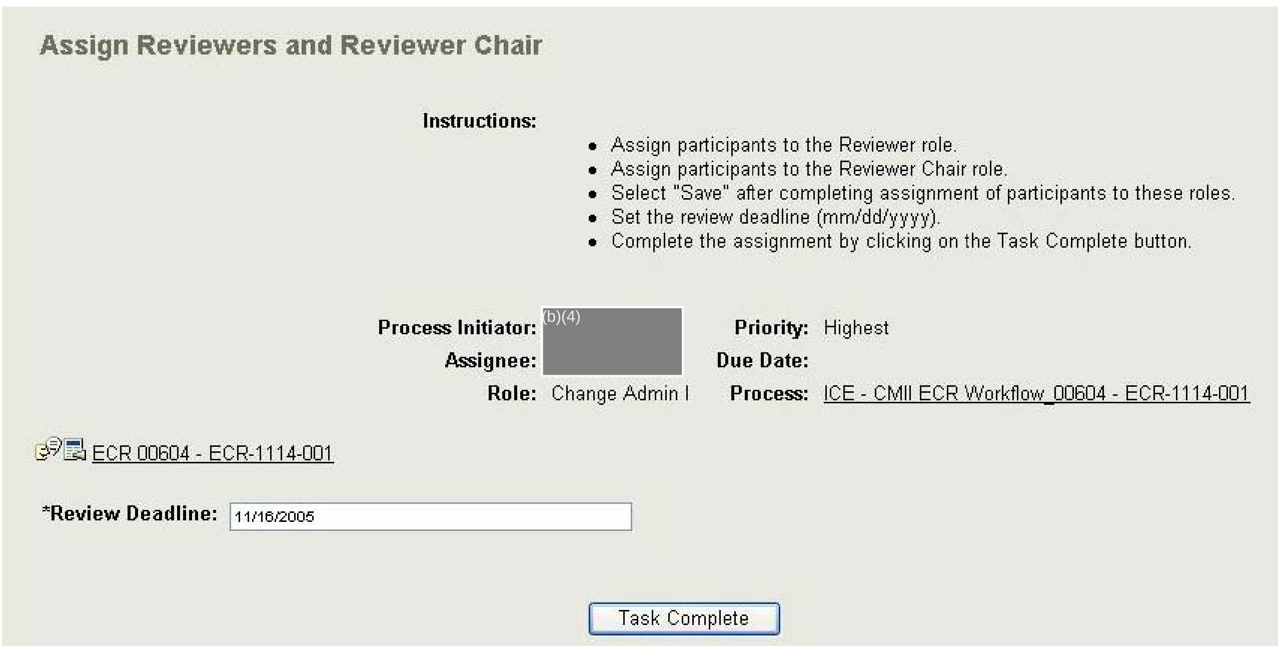
"Assign Reviewers and Reviewer Chair" Workflow Task

Responsible Role: Change Admin I

Input the review deadline and make role/participant assignments (as indicated by the *Screening Group Checklist* form), per task instructions. Click the link to the completed *Screening Group Checklist* form (under the "Task Complete" button) for Reviewer and Reviewer Chair names. See "Assigning Roles to Participants in Workflow Tasks" for detailed instructions.

Windchill Role	Process Role
Reviewer	Change Review Board (CRB) members
Reviewer Chair	CRB Chair

Click the "**Task Complete**" button after entering deadline and making role/participant assignments.



Return to ECR Process Matrix

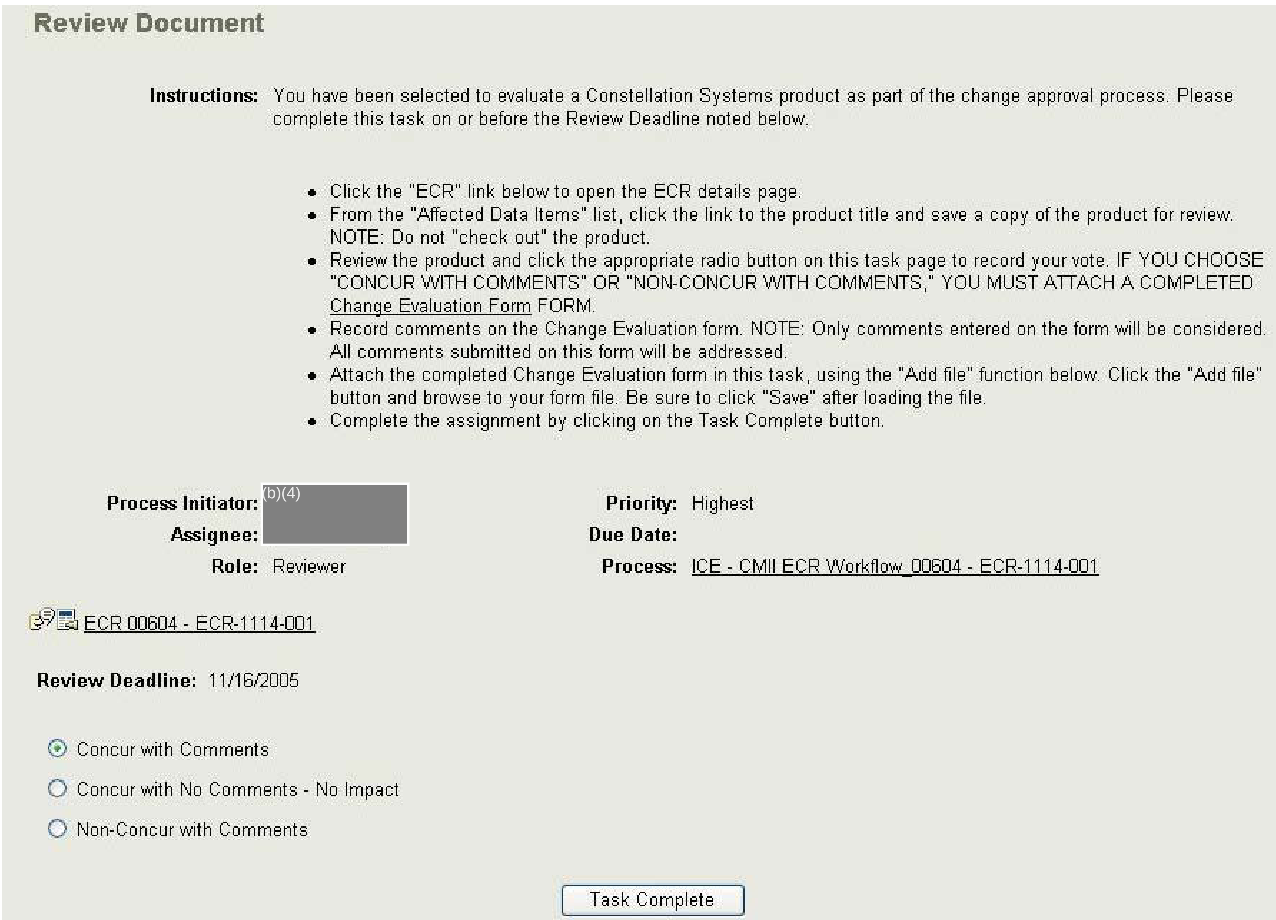
Use the "Back" button on the Web toolbar to return to previous location in this document.

"Review Document" Workflow Task

Responsible Role: Reviewer

Review the ECR and provide concurrence/non-concurrence vote and comments per task instructions. Record any comments on the Change Evaluation Form and attach file. See "Attaching Files into Workflow Tasks" for detailed instructions. NOTE: A completed Change Evaluation Form is required for "Concur with Comments" and "Non-Concur with Comments" votes.

Click the "**Task Complete**" button after recording vote and attaching file (if required).


Review Document

Instructions: You have been selected to evaluate a Constellation Systems product as part of the change approval process. Please complete this task on or before the Review Deadline noted below.

- Click the "ECR" link below to open the ECR details page.
- From the "Affected Data Items" list, click the link to the product title and save a copy of the product for review. NOTE: Do not "check out" the product.
- Review the product and click the appropriate radio button on this task page to record your vote. IF YOU CHOOSE "CONCUR WITH COMMENTS" OR "NON-CONCUR WITH COMMENTS," YOU MUST ATTACH A COMPLETED Change Evaluation Form FORM.
- Record comments on the Change Evaluation form. NOTE: Only comments entered on the form will be considered. All comments submitted on this form will be addressed.
- Attach the completed Change Evaluation form in this task, using the "Add file" function below. Click the "Add file" button and browse to your form file. Be sure to click "Save" after loading the file.
- Complete the assignment by clicking on the Task Complete button.

Process Initiator: (b)(4) [redacted]
Assignee: [redacted]
Role: Reviewer

Priority: Highest
Due Date:
Process: ICE - CMII ECR Workflow_00604 - ECR-1114-001

ECR 00604 - ECR-1114-001

Review Deadline: 11/16/2005

- (•) Concur with Comments
- ( ) Concur with No Comments - No Impact
- ( ) Non-Concur with Comments

Task Complete

Return to ECR Process Matrix

"Collect and Summarize Comments" Workflow Task

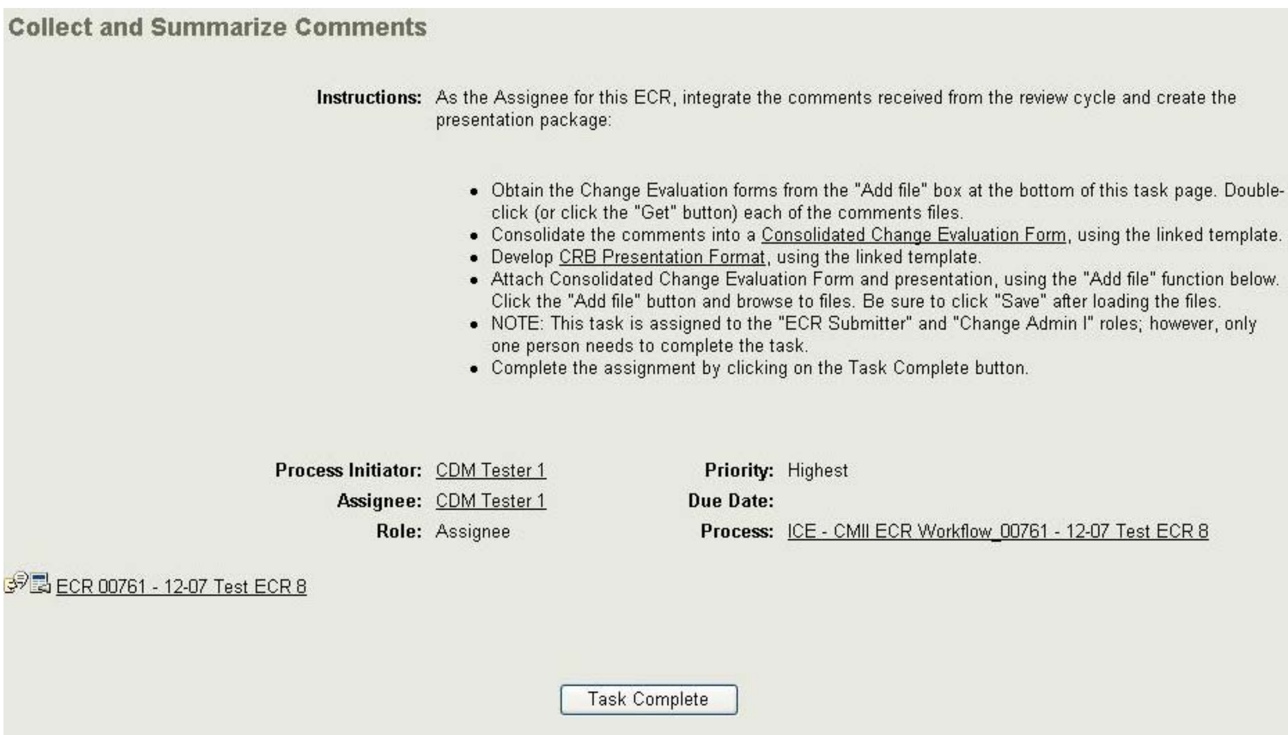
Responsible Role: Submitter ("Assignee")*
*NOTE: Change Admin I also receives this task

Collect the attached Change Evaluation Forms from the "Add File" box within this task. See "Obtaining Files from Workflow Tasks" for detailed instructions. Consolidate the comments received and summarize them into a Consolidated Change Evaluation Form. Develop presentation for the ECR.

Attach the completed Consolidated Change Evaluation Form and CRB presentation files to the workflow. See "Attaching Files into Workflow Tasks" for detailed instructions.

NOTE: This task also provides an opportunity to attach late evaluations (either due to reviewers missing the deadline or not attaching evaluations into the workflow). These evaluations may be attached using the same procedure for the presentation and consolidated change evaluation.

Click the "**Task Complete**" button after all files have been attached.



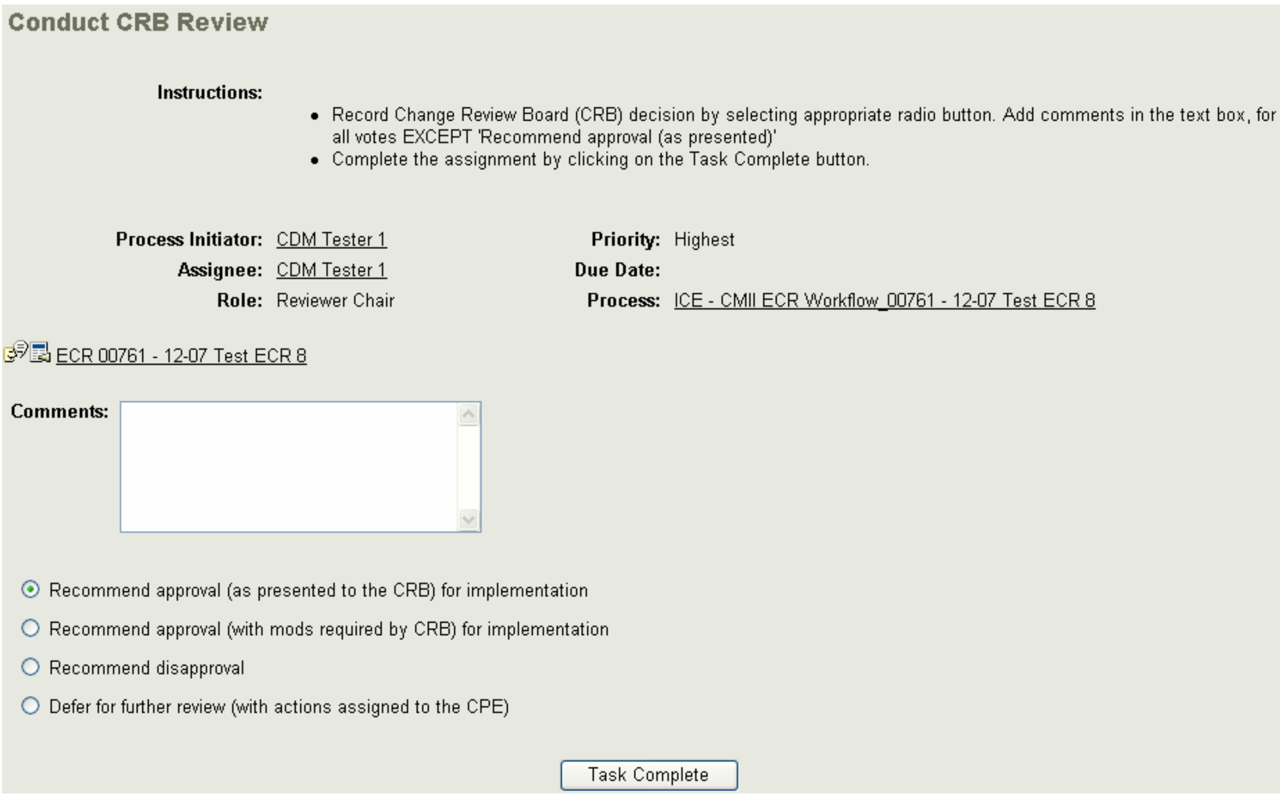
Return to ECR Process Matrix

"Conduct CRB Review" Workflow Task

Responsible Role: Reviewer Chair

Review the consolidated change evaluation and presentation files, enter comments, and record the Change Review Board (CRB) recommendation for this ECR. See "Obtaining Files from Workflow Tasks" for detailed instructions.

Click the "**Task Complete**" button after recording votes and entering comments.



Return to ECR Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

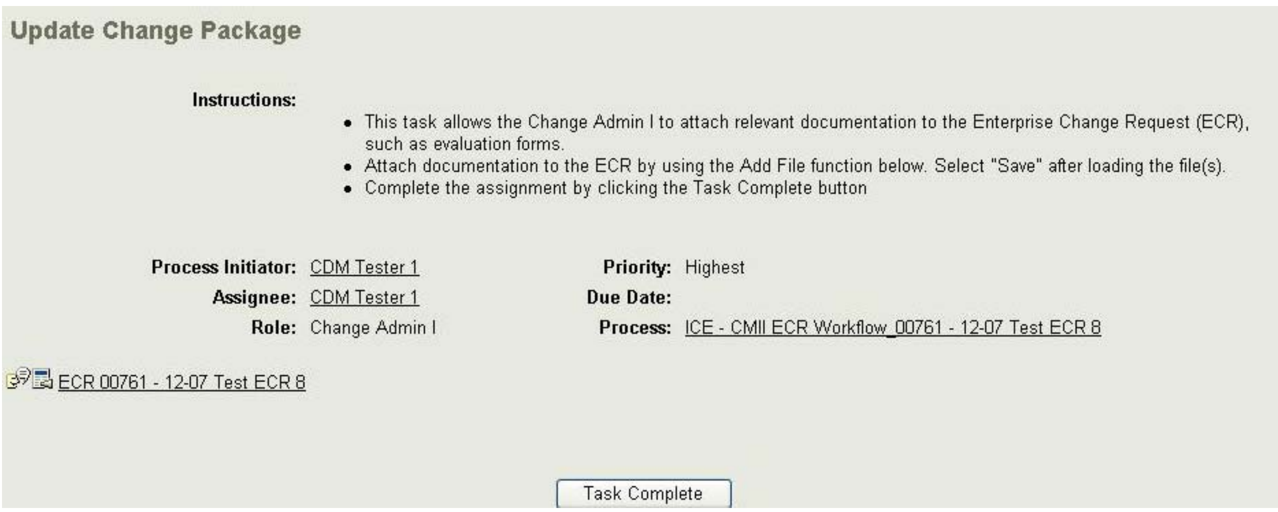
"Update Change Package" Workflow Task

Responsible Role: Change Admin I

Attach relevant documentation to the ECR workflow by using the "Add File" function within the task. See "Attaching Files into Workflow Tasks" for detailed instructions.

NOTE: This is not an "Update" to the ECR's Details page.

Click the "**Task Complete**" button after attaching all relevant documentation (if required).



Return to ECR Process Matrix

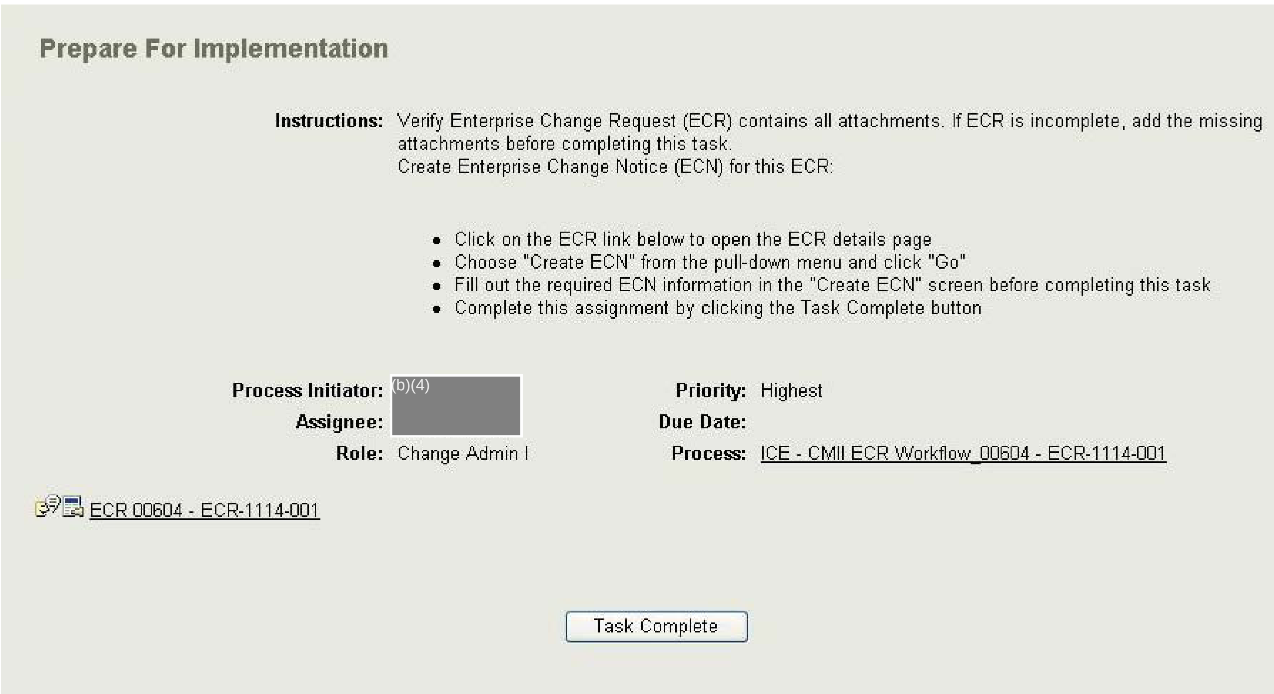
Use the "Back" button on the Web toolbar to return to previous location in this document.

"Prepare for Implementation" Workflow Task

Responsible Role: Change Admin I

Follow the task instructions to create the Enterprise Change Notice (ECN) which will implement the changes requested in the ECR. See "Create ECN from ECR Details Page" for detailed instructions. Creating the ECN starts the change implementation process.

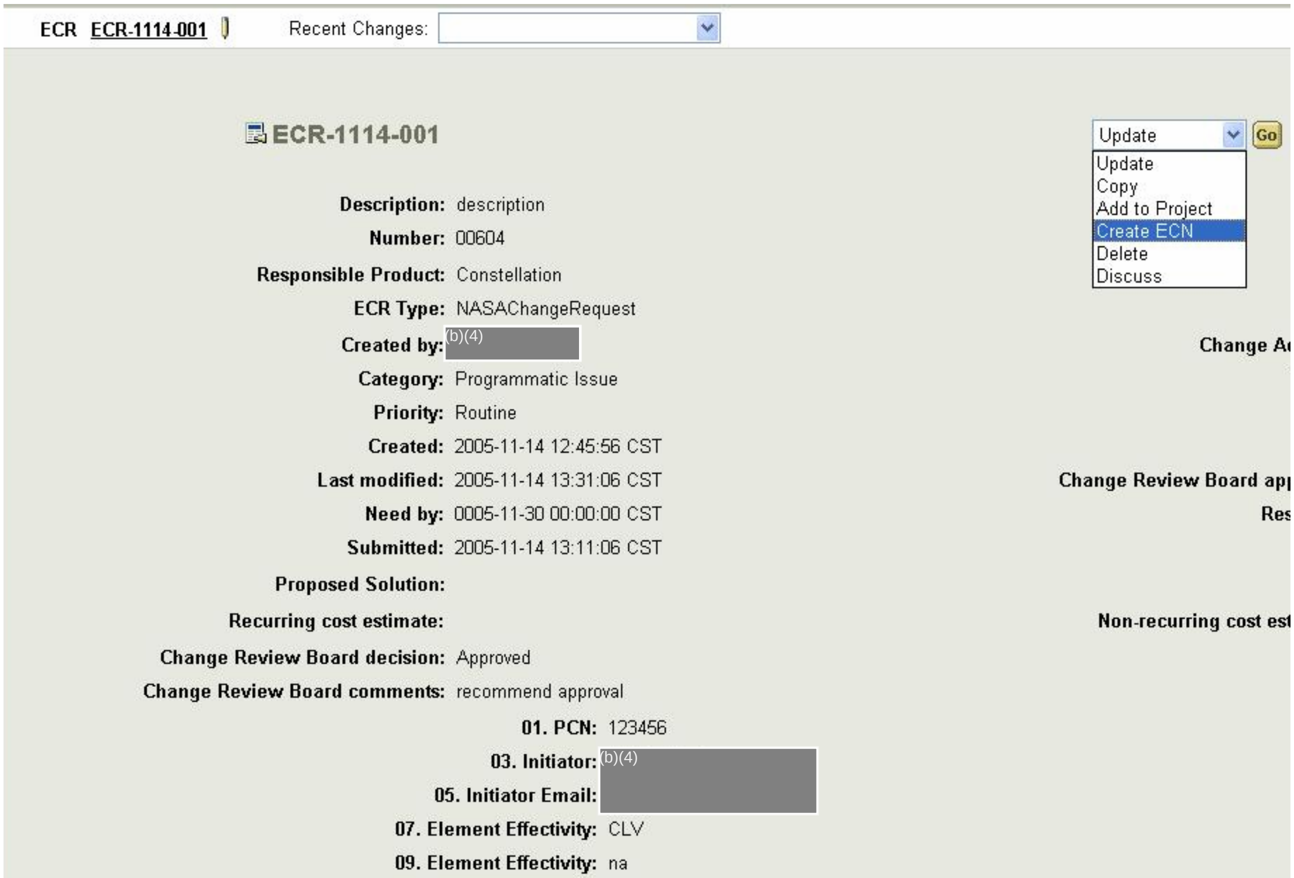
Click the "**Task Complete**" button after creating the ECN.



Return to ECR Process Matrix

Create ECN from ECR Details page

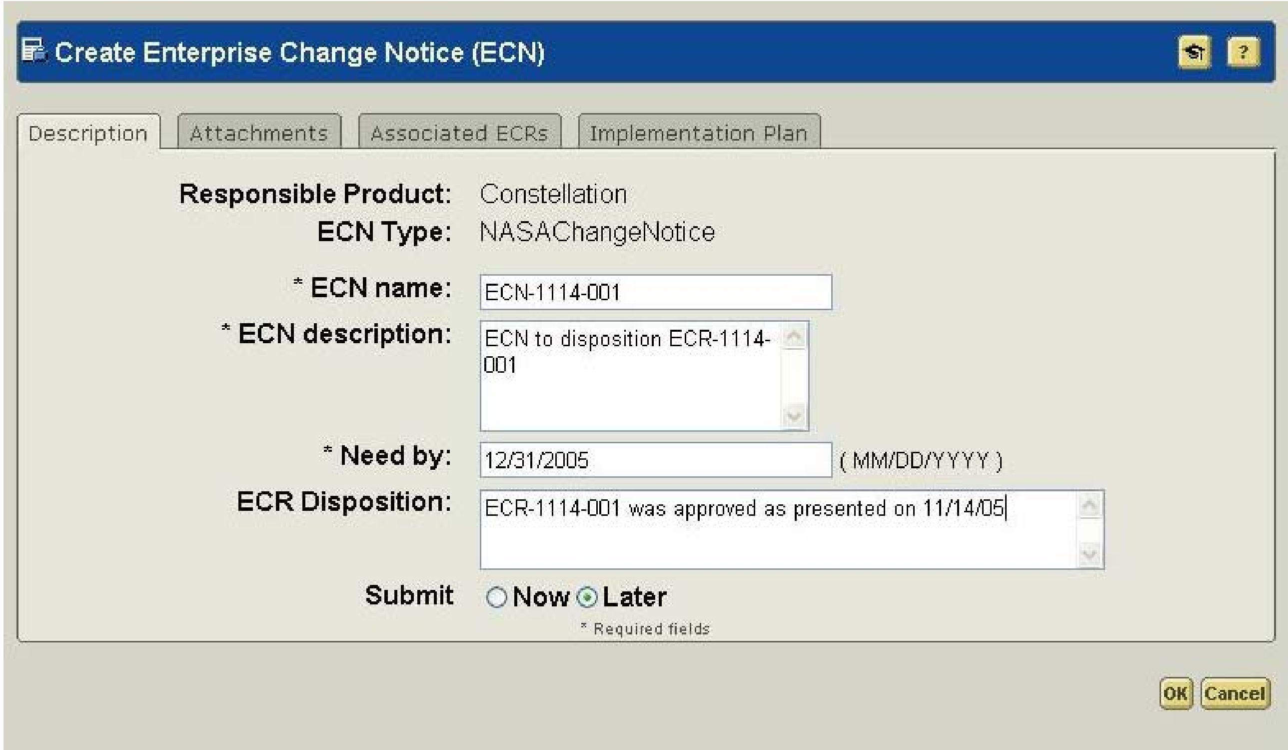
From within the ECR "Prepare for Implementation" task, click the ECR link to access the ECR Details page. On the ECR Details page, select "Create ECN" from the pull-down menu and click the "**Go**" button. See "Complete 'Create ECN' Attributes" for detailed instructions.



Return to ECN Process Matrix

Complete "Create ECN" attributes

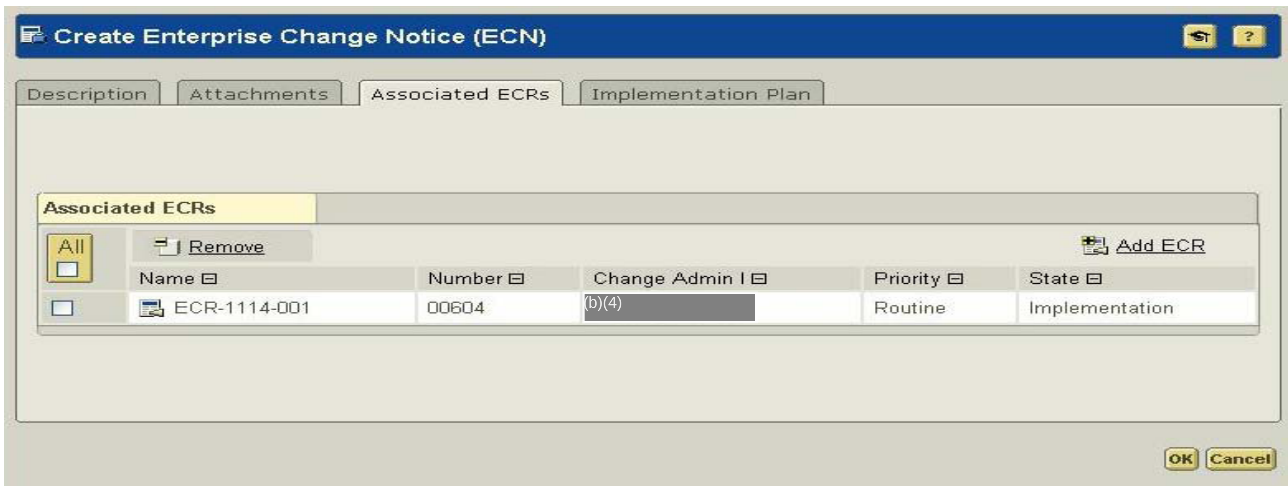
On the Description tab of the "Create ECN" window, enter the following information:
ECN Name
ECN Description
Need by date
ECR Disposition
Choose Submit "Now" or "Later"
NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.



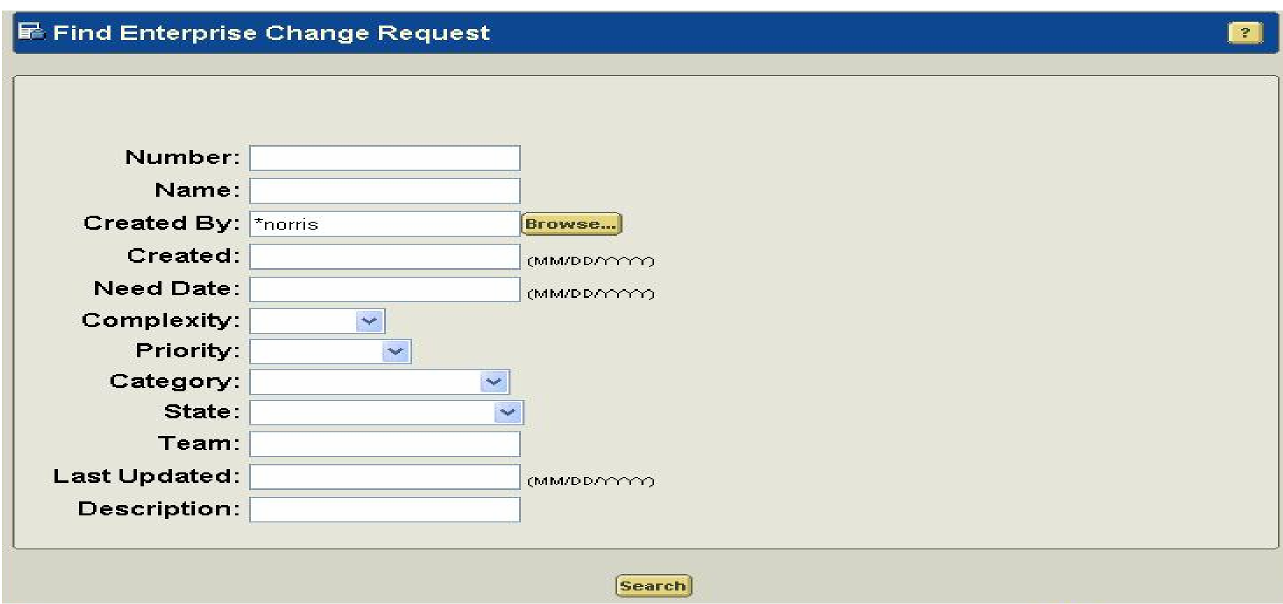
Return to ECN Process Matrix

Add Associated ECRs to ECN (if required)

Click the "Associated ECRs" tab of the "Create ECN" screen. The ECR for which the ECN has been created will appear in the "Associated ECRs" window. To add any other associated ECRs, click "Add ECR" and search for the ECR(s) using the fields on the "Find Enterprise Change Request" window.
NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.



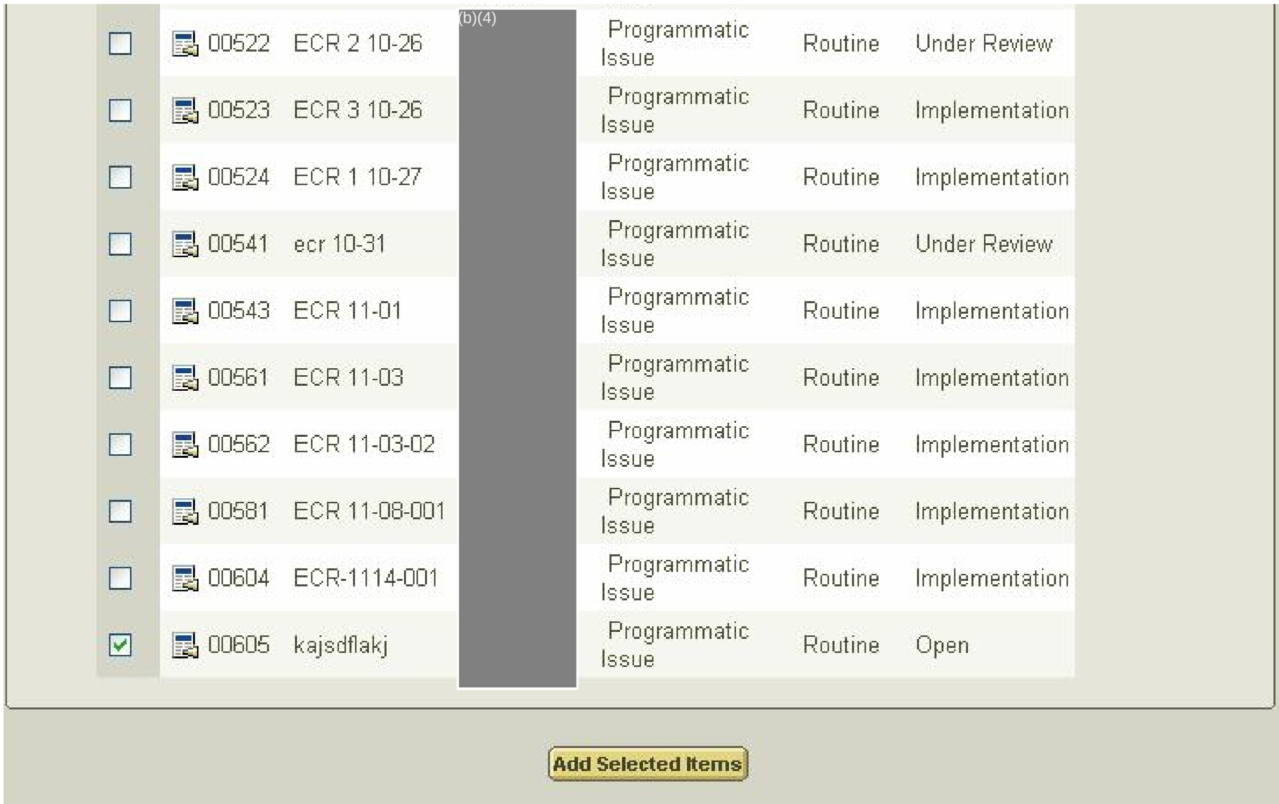
Enter search criteria in one or more fields in this window and click the "Search" button.
NOTE: "*" may be used for partial entries.



Return to ECN Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

Select the associated ECR(s) from the “Search Results” window by checking the box next to each ECR. Click the “**Add Selected Items**” button at the bottom of the window.
NOTE: ECRs that are associated with other ECNs cannot be added to this ECN.



☐	00522	ECR 2 10-26	(b)(4) [redacted]	Programmatic Issue	Routine	Under Review
☐	00523	ECR 3 10-26		Programmatic Issue	Routine	Implementation
☐	00524	ECR 1 10-27		Programmatic Issue	Routine	Implementation
☐	00541	ecr 10-31		Programmatic Issue	Routine	Under Review
☐	00543	ECR 11-01		Programmatic Issue	Routine	Implementation
☐	00561	ECR 11-03		Programmatic Issue	Routine	Implementation
☐	00562	ECR 11-03-02		Programmatic Issue	Routine	Implementation
☐	00581	ECR 11-08-001		Programmatic Issue	Routine	Implementation
☐	00604	ECR-1114-001		Programmatic Issue	Routine	Implementation
☑	00605	kajsdflakj		Programmatic Issue	Routine	Open

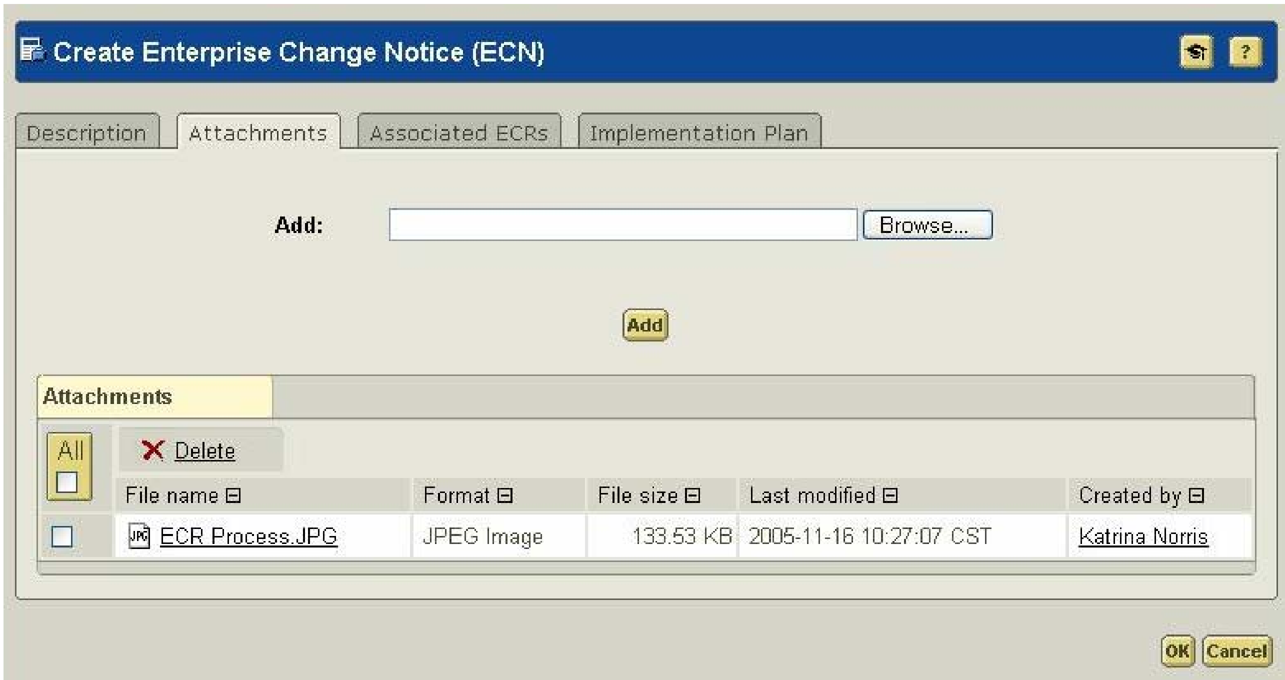
Add Selected Items

[Return to ECN Process Matrix](#)

Use the “Back” button on the Web toolbar to return to previous location in this document.

Add Attachments to ECN (if required)

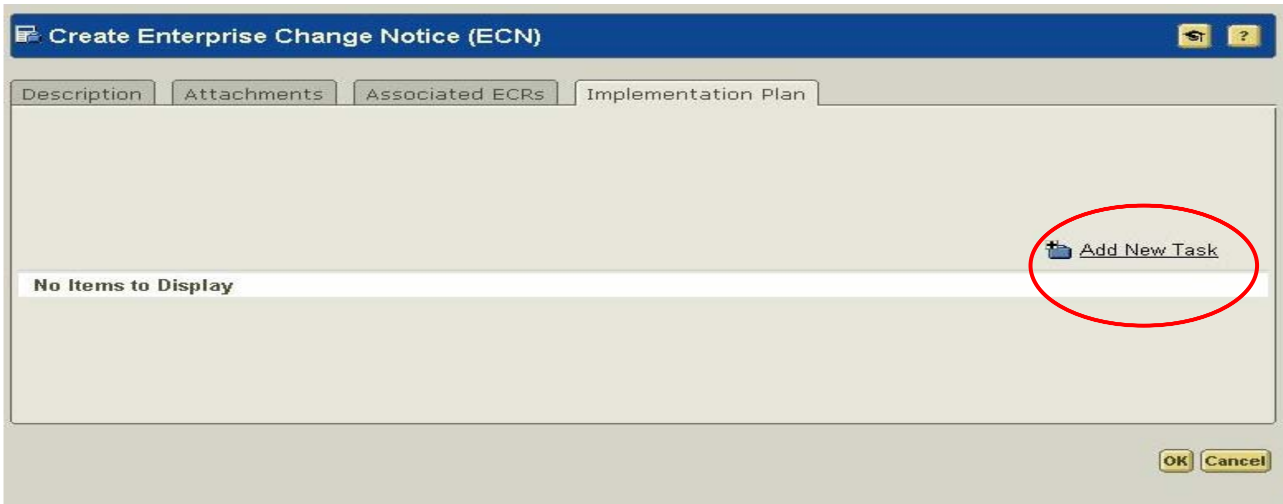
Click the "Attachments" tab to add any attachments to the ECN.
Click the "**Browse**" button and browse to the relevant file, then click the "**Add**" button.
NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.



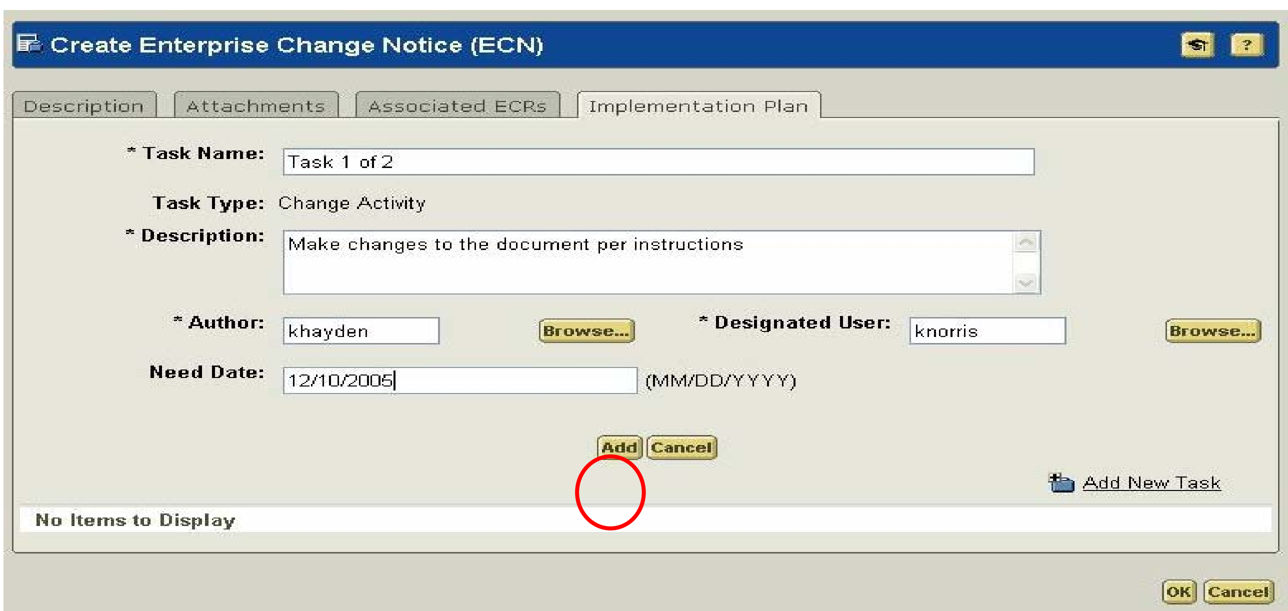
Return to ECN Process Matrix

Add tasks to the ECN Implementation Plan

To add tasks to the ECN, go to the "Implementation Plan" tab and click "Add New Task":



Add the following information for each task:
Task Name
Description – enter either detailed changes to be made or point to the attachment that defines the changes
Author – in this case, "Author" is the "actionee" (the person responsible for completing this action)
Designated User – the person responsible for accepting the Author's (actionee's) work to close the action here assigned (usually, this will be the CPE)
Need Date
Click the "**Add**" button



NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.

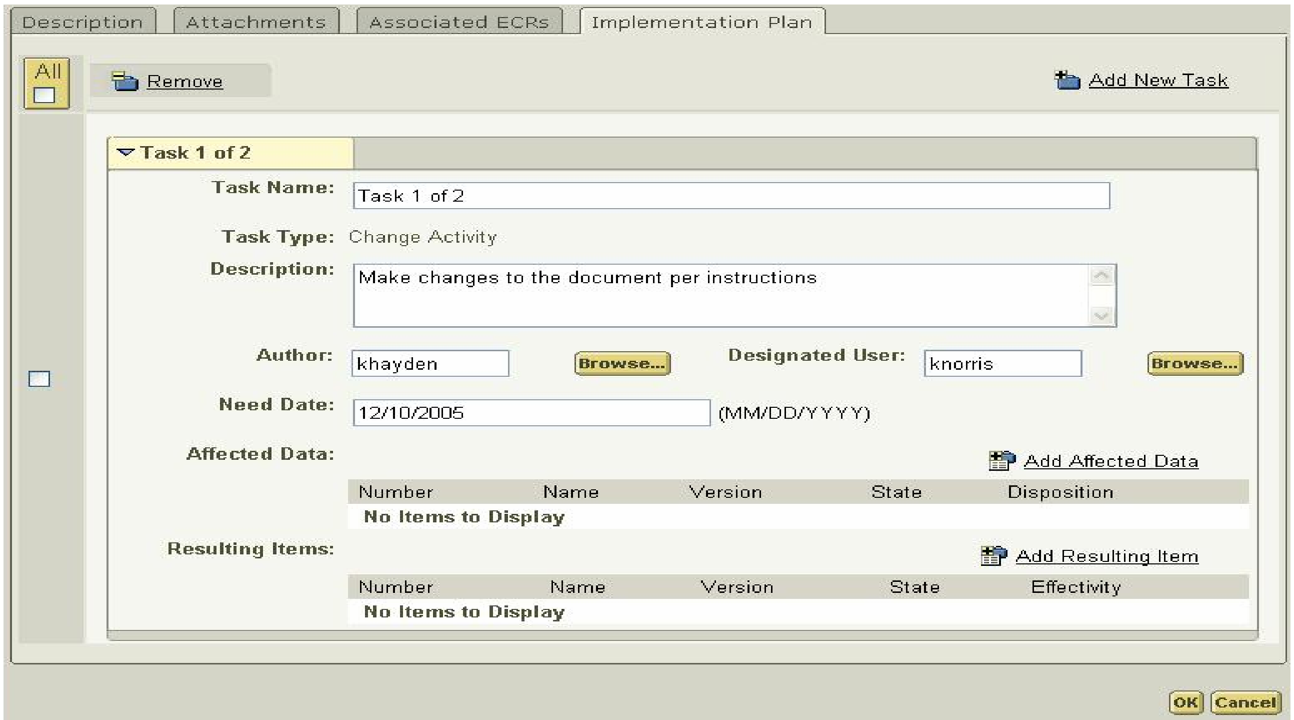
Return to ECN Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

Expand the Task (click the arrow next to the task name) to add "Affected Data" and/or "Resulting Items" (as required). NOTE: Not all Implementation Plan tasks will require "Affected Data" or "Resulting Items."

See "Adding Affected Data to ECN Implementation Plan Tasks" and "Adding Resulting Items to ECN Implementation Plan Tasks."

NOTE: Do not click the yellow "OK" button until all ECN fields are completed. Add all associated ECRs, attachments, and Implementation Plan tasks before submitting the ECN to the Receipt and Release Desk. Choose "Submit Later" to allow for updates in the "Submit ECN" task.



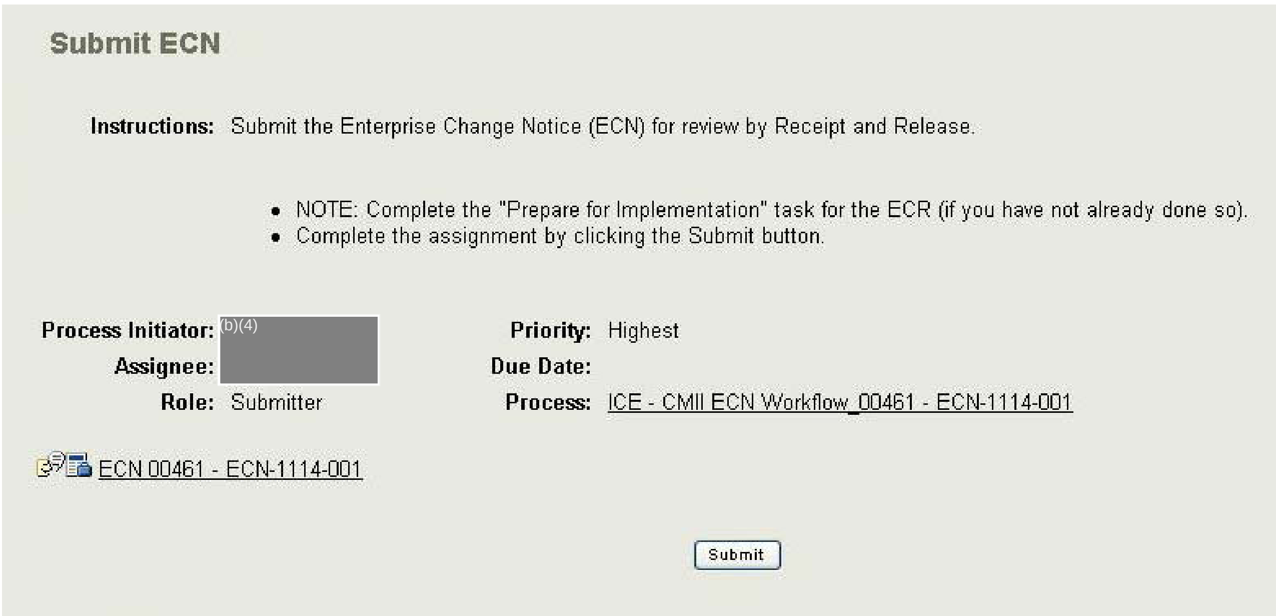
Return to ECN Process Matrix

"Submit ECN" Workflow Task

Responsible Role: Change Admin II (Change Package Manager)

If ECN updates are required, click the ECN link in the task to access the ECN's Details page. See "Updating ECN from ECN Details Page" for detailed instructions.

Click the "**Submit**" button when the ECN is ready for submittal to the Receipt and Release Desk.



Return to ECN Process Matrix

"Receipt and Release" Workflow Task

Responsible Role: Evaluator

Review the ECN and determine if it is ready for processing. Make role/participant assignments and record accept/rework vote per task instructions. See "Assigning Roles to Participants in Workflow Tasks" for detailed instructions.

Windchill Role	Process Role
Change Admin II	Change Package Manager
Change Admin III	Receipt and Release Desk
Organization Administrator	CIB Secretariat
ECR Author	Submitter of associated ECR

Click the "**Task Complete**" button after all role/participant assignments and accept/rework vote have been recorded.

Return to ECN Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

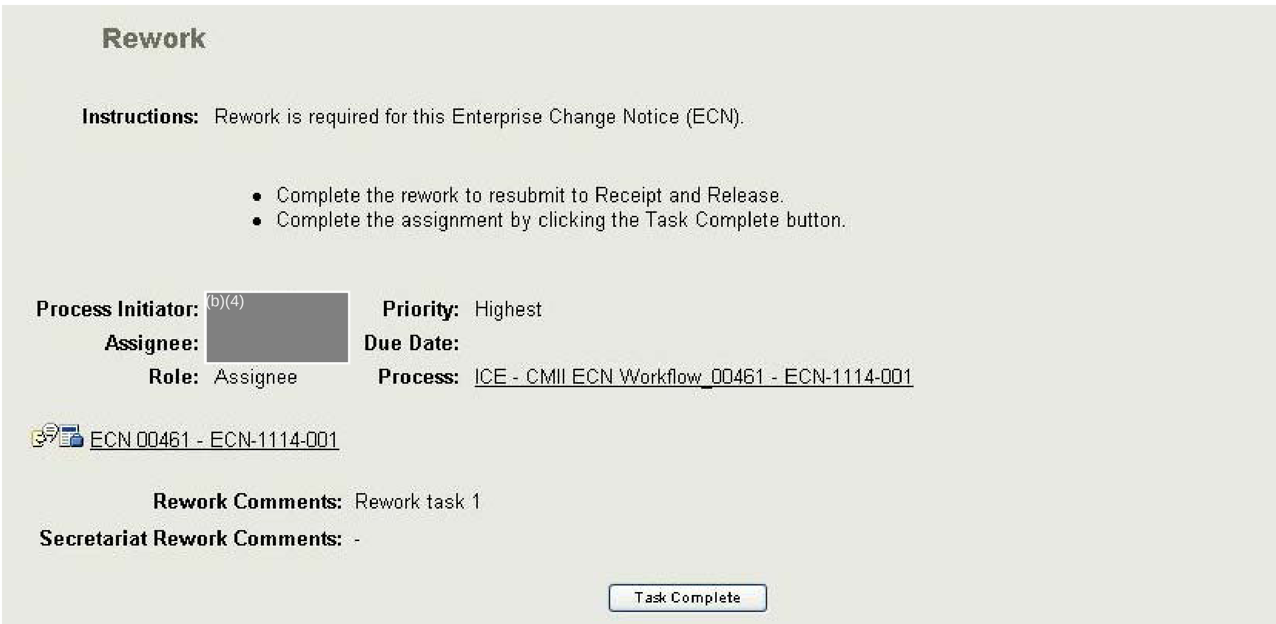
“Rework ECN” Workflow Task

Responsible Role: Submitter

“Rework” is required for this ECN, per the “Receipt and Release” task.

Review the Rework Comments in this task and perform the required rework. Update the ECN by clicking the ECN link in this task and following the detailed instructions in “Updating ECN from ECN Details Page.”

Click the “**Task Complete**” button when rework has been completed.



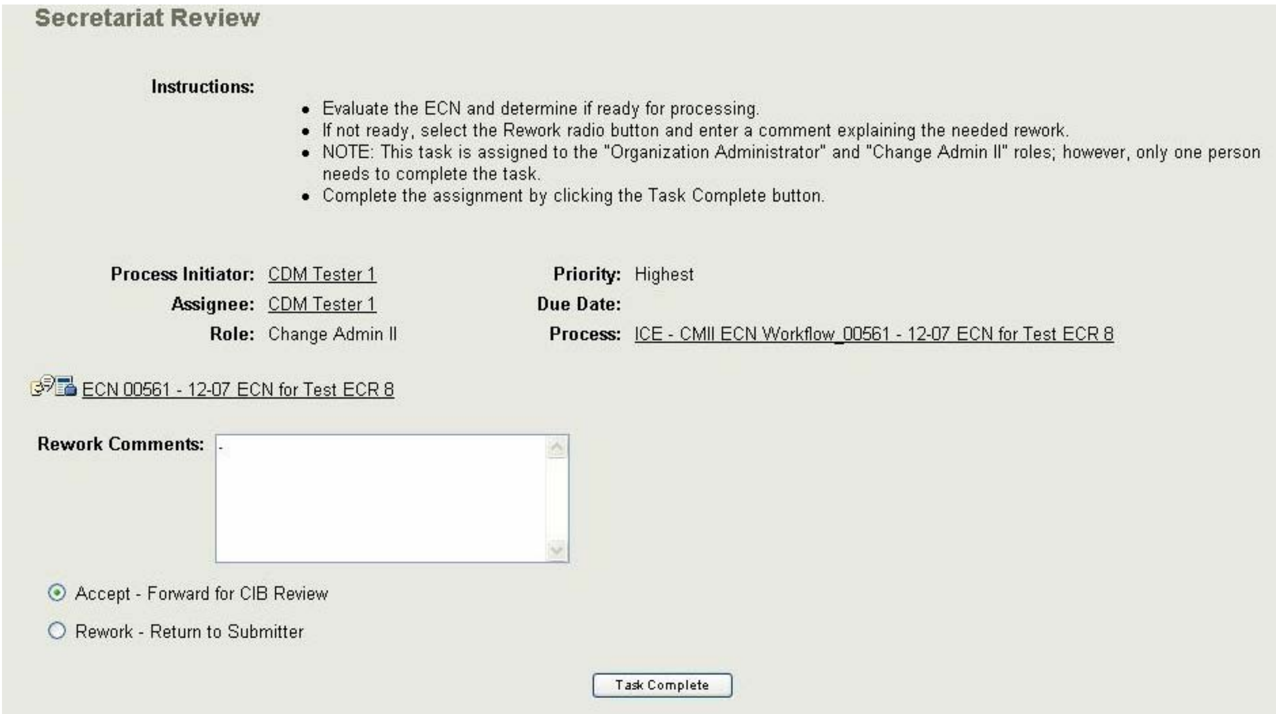
Return to ECN Process Matrix

"Secretariat Review" Workflow Task

Responsible Role: Organization Administrator (Secretariat)
*NOTE: Change Admin II (Change Package Manager) also receives this task

Review the ECN and determine if it is ready for processing. Record accept/rework vote, per tasks instructions. If rework is required, this ECN will return for another Secretariat Review until it is accepted.

Click the "**Task Complete**" button after recording accept/rework vote.



[Return to ECN Process Matrix]

Use the "Back" button on the Web toolbar to return to previous location in this document.

"Assign Approvers and Chair" Workflow Task

Responsible Role: Change Admin II

Input the approval deadline and make role/participant assignments, per task instructions. See "Assigning Roles to Participants in Workflow Tasks" for detailed instructions.

Windchill Role	Process Role
Approver	Change Implementation Board (CIB) members
Approver Chair	CIB Chair

Click the "**Task Complete**" button after entering deadline and making role/participant assignments.

Return to ECN Process Matrix

Use the "Back" button on the Web toolbar to return to previous location in this document.

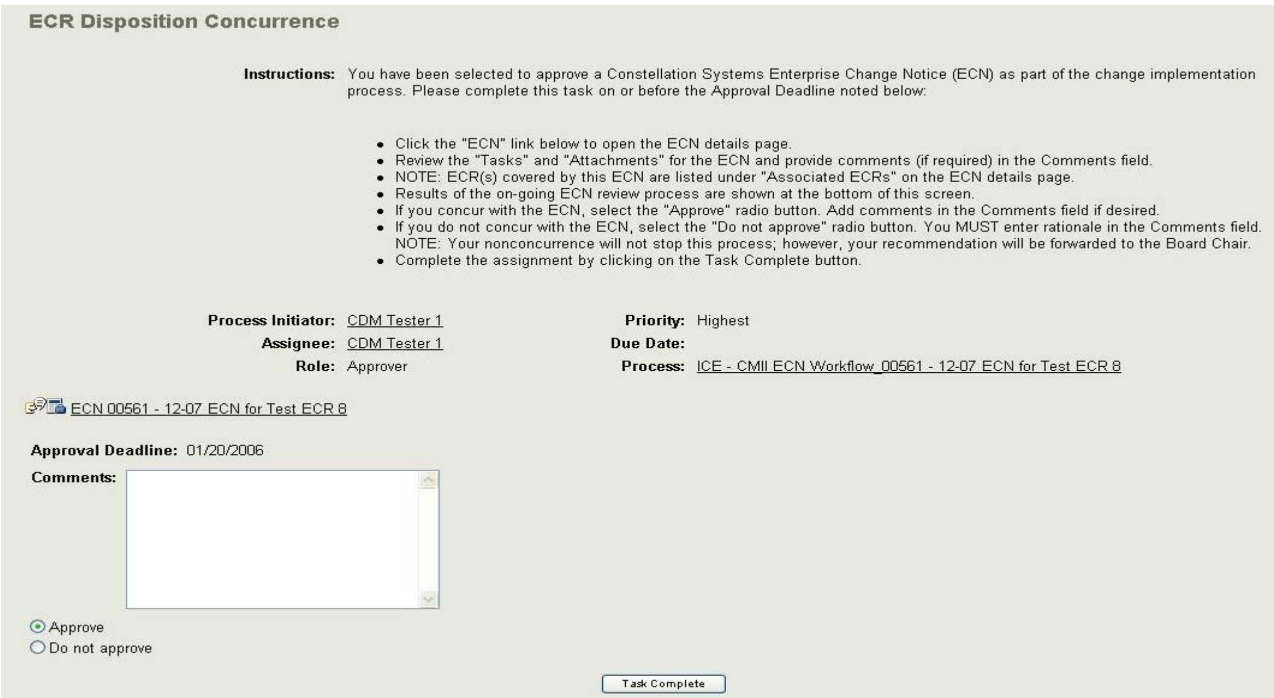
"ECR Disposition Concurrence" Workflow Task

Responsible Role: Approver

Review the ECN tasks and ECR disposition and vote "Approve" or "Do Not Approve". Enter comments for "Do Not Approve." At the bottom of the task page are details for "ECR Disposition Concurrence" tasks previously completed by other Approvers.

NOTE: "Do Not Approve" = nonconcurrence with ECR disposition; "Approve" = concurrence with ECR disposition.

Click the "**Task Complete**" button after entering comments and recording vote.



Enter comments in the "Comments" text box and click the appropriate radio button.

[Return to ECN Process Matrix]

Use the "Back" button on the Web toolbar to return to previous location in this document.

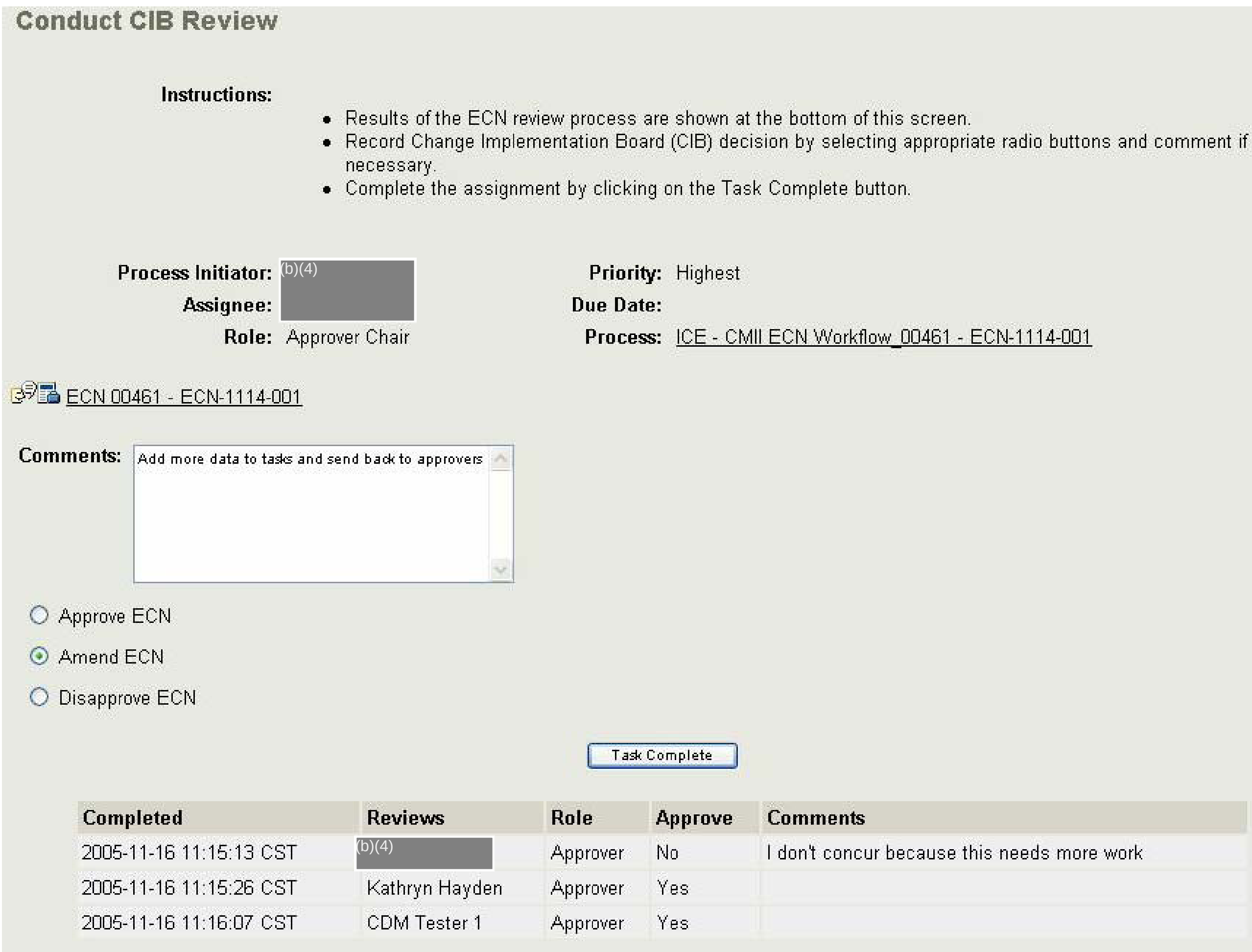
"Conduct CIB Review" Workflow Task

Responsible Role: Approver Chair

Review the ECN and the Approvers' votes (listed in the table beneath the "**Task Complete**" button). Click the ECN link in the task to access the ECN's Details page. Record the CIB decision and enter comments for "Amend ECN" or "Disapprove ECN" votes.

An "Amend ECN" vote requires the Change Admin II to update the ECN (per comments entered in this task). A "Disapprove ECN" vote cancels this ECN and the associated ECR(s).

Click the "**Task Complete**" button after entering comments and recording vote.



[Return to ECN Process Matrix]

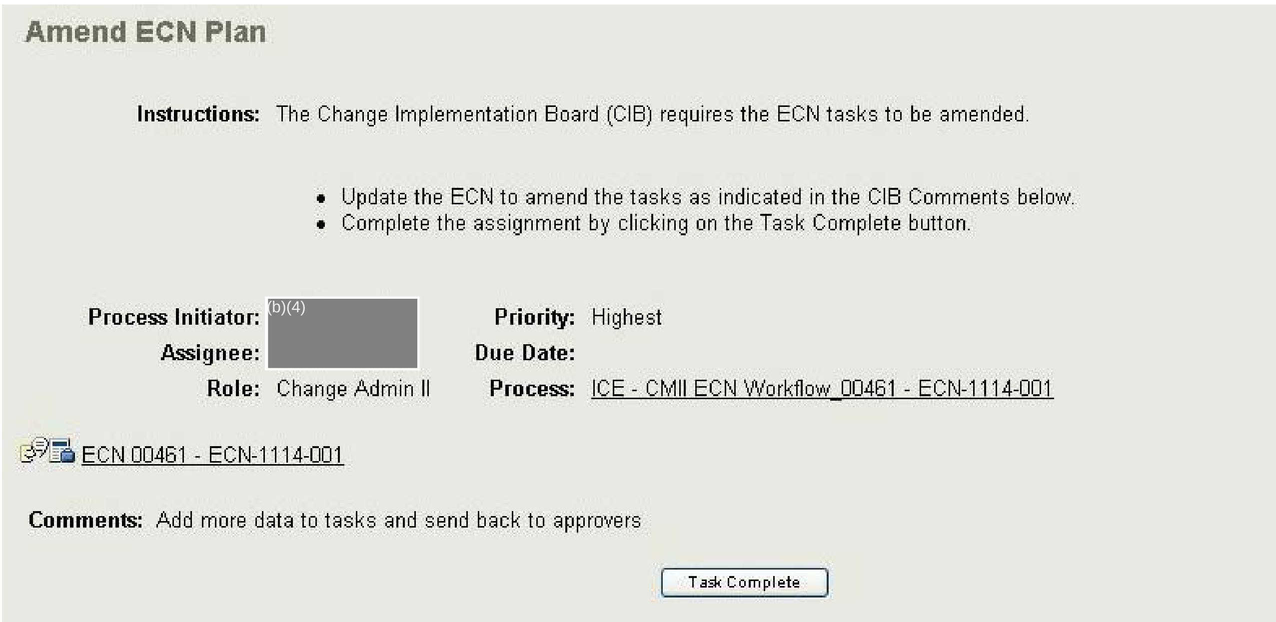
Use the "Back" button on the Web toolbar to return to previous location in this document.

"Amend ECN Plan" Workflow Task

Responsible Role: Change Admin II*
*NOTE: ECR Author also receives this task

Update the ECN per the Approver Chair comments. See "Updating ECN from ECN Details Page" for detailed instructions. Make only the changes required by the Approver Chair.

Click the "**Task Complete**" button after completing required updates.



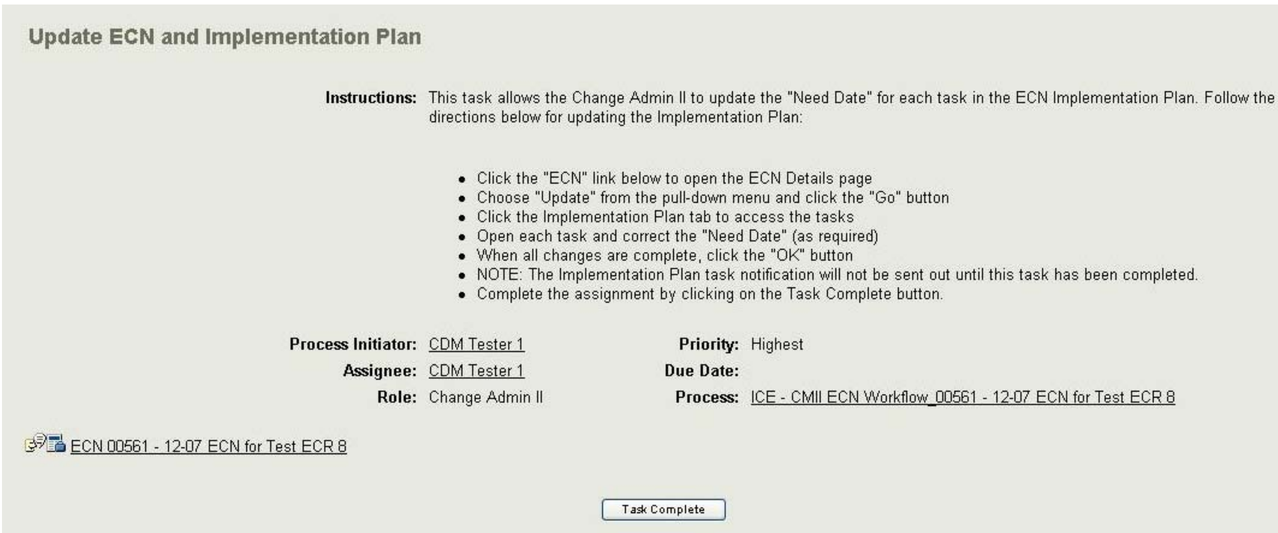
Return to ECN Process Matrix

"Update ECN and Implementation Plan" Workflow Task

Responsible Role: Change Admin II

Update the ECN to revise the "Need Dates" on the Implementation Plan tasks based on the approval date of the ECN. See "Updating ECN from ECN Details Page" for detailed instructions.

Click the "**Task Complete**" button after revising the dates for all Implementation Plan tasks.



Return to ECN Process Matrix

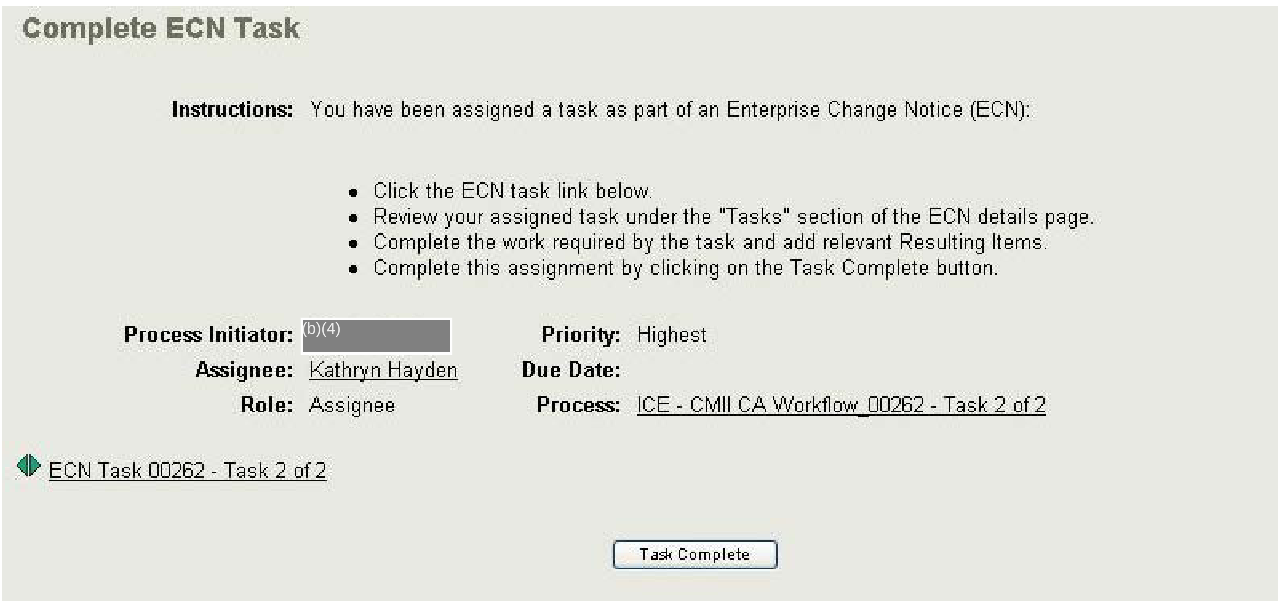
"Complete ECN Task" Workflow Task

Responsible Role: Assignee/Implementation Plan "Author" (Actionee)

Complete the work required by the Implementation Plan task and indicate completion of that work by completing this workflow task.

Click the ECN task link in this workflow task and update and/or add Resulting Items (if required). See "Accessing Implementation Plan Tasks from Details Page," "Updating Resulting Items," and "Adding Resulting Items to ECN Implementation Plan Tasks" for detailed instructions. NOTE: Do not add or update "Affected Data." Complete this task on or before the "Need Date" for this Implementation Plan task.

Click the "**Task Complete**" button after completing work required by the Implementation Plan task.



Complete ECN Task

Instructions: You have been assigned a task as part of an Enterprise Change Notice (ECN):

- Click the ECN task link below.
- Review your assigned task under the "Tasks" section of the ECN details page.
- Complete the work required by the task and add relevant Resulting Items.
- Complete this assignment by clicking on the Task Complete button.

Process Initiator: (b)(4) [redacted]
Priority: Highest
Assignee: Kathryn Hayden
Due Date:
Role: Assignee
Process: ICE - CMII CA Workflow_00262 - Task 2 of 2

ECN Task 00262 - Task 2 of 2

Task Complete

Return to ECN Process Matrix

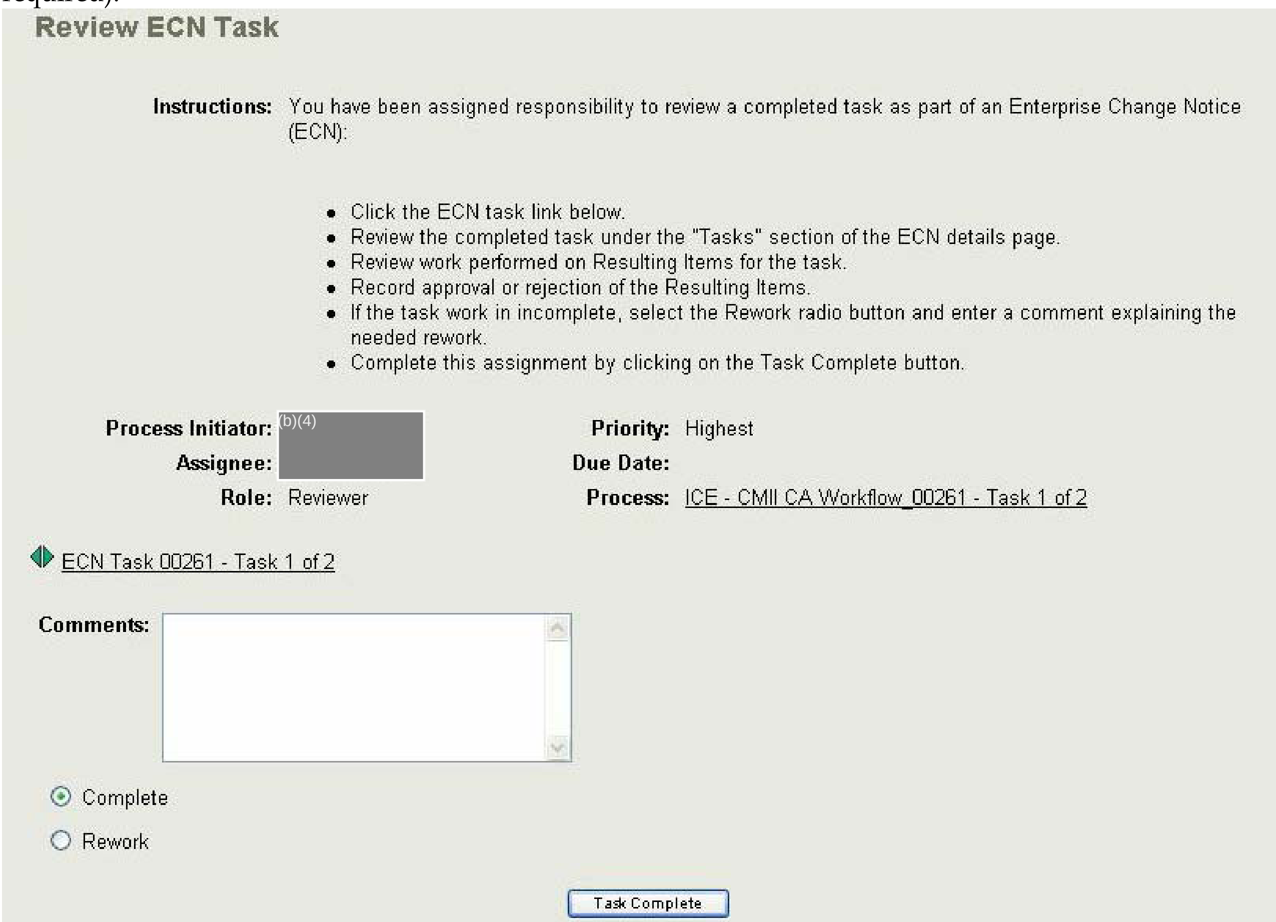
Use the "Back" button on the Web toolbar to return to previous location in this document.

"Review ECN Task" Workflow Task

Responsible Role: Reviewer/Implementation Plan "Designated User"

Review the completed Implementation Plan task and choose complete/rework vote, per task instructions. See "Accessing Implementation Plan Tasks from Details Page" and "Accessing Resulting Items" for detailed instructions. NOTE: Review "Resulting Items" only.

Click the "**Task Complete**" button after recording complete/rework vote and adding comments (if required).



Return to ECN Process Matrix

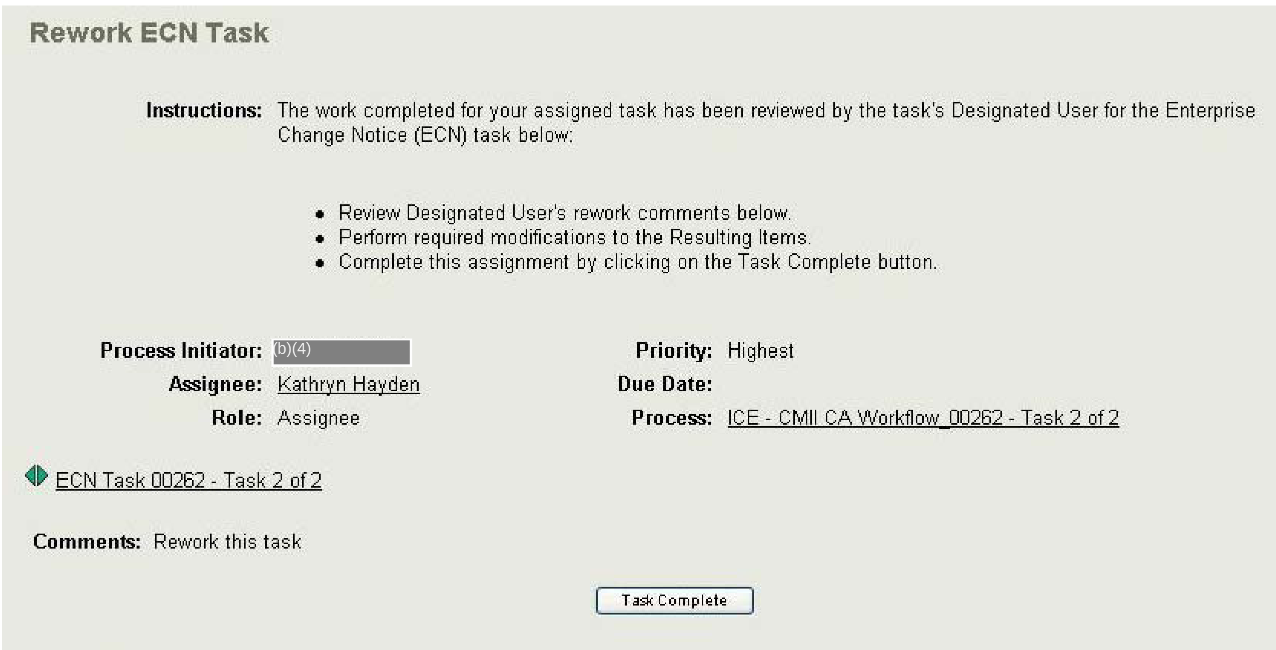
"Rework ECN Task" Workflow Task

Responsible Role: Assignee/Implementation Plan "Author" (Actionee)

"Rework" is required for this Implementation Plan task, per the "Review ECN Task" task.

Review the Rework Comments in this task and perform the required rework. See "Updating ECN from ECN Details Page," "Updating Resulting Items" and "Adding Resulting Items to ECN Implementation Plan Tasks."

Click the "**Task Complete**" button when rework has been completed.



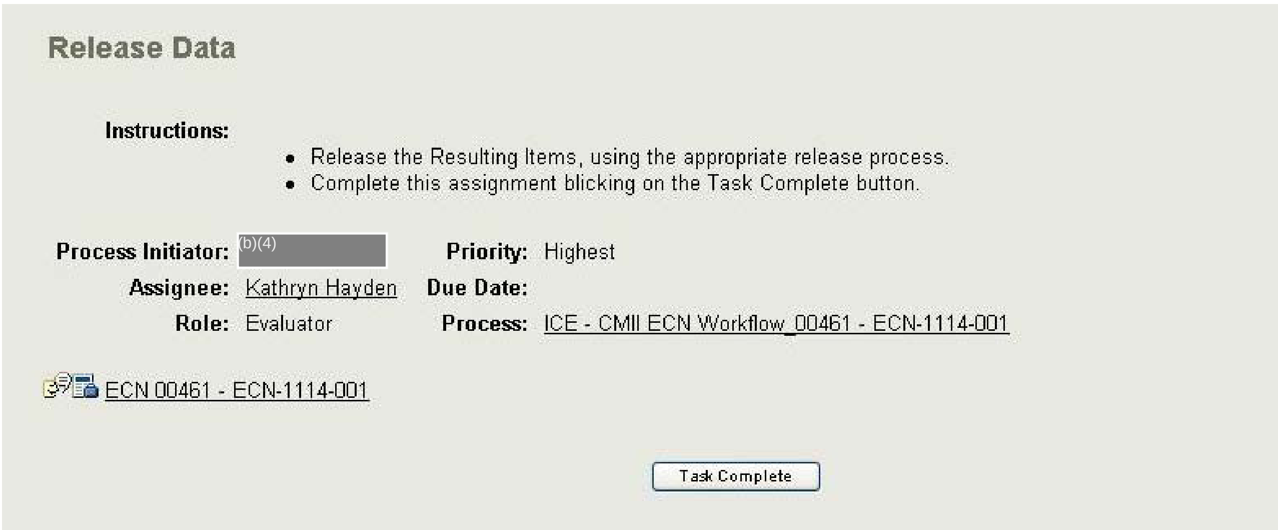
Return to ECN Process Matrix

"Release Data" Workflow Task

Responsible Role: Evaluator (Receipt and Release Desk)

Complete the release process(es) appropriate for the data.

Click the "**Task Complete**" button after release process(es) are complete.



Release Data

Instructions:

- Release the Resulting Items, using the appropriate release process.
- Complete this assignment blicking on the Task Complete button.

Process Initiator: (b)(4) [redacted] **Priority:** Highest
Assignee: Kathryn Hayden **Due Date:**
Role: Evaluator **Process:** ICE - CMII ECN Workflow_00461 - ECN-1114-001

ECN 00461 - ECN-1114-001

Task Complete

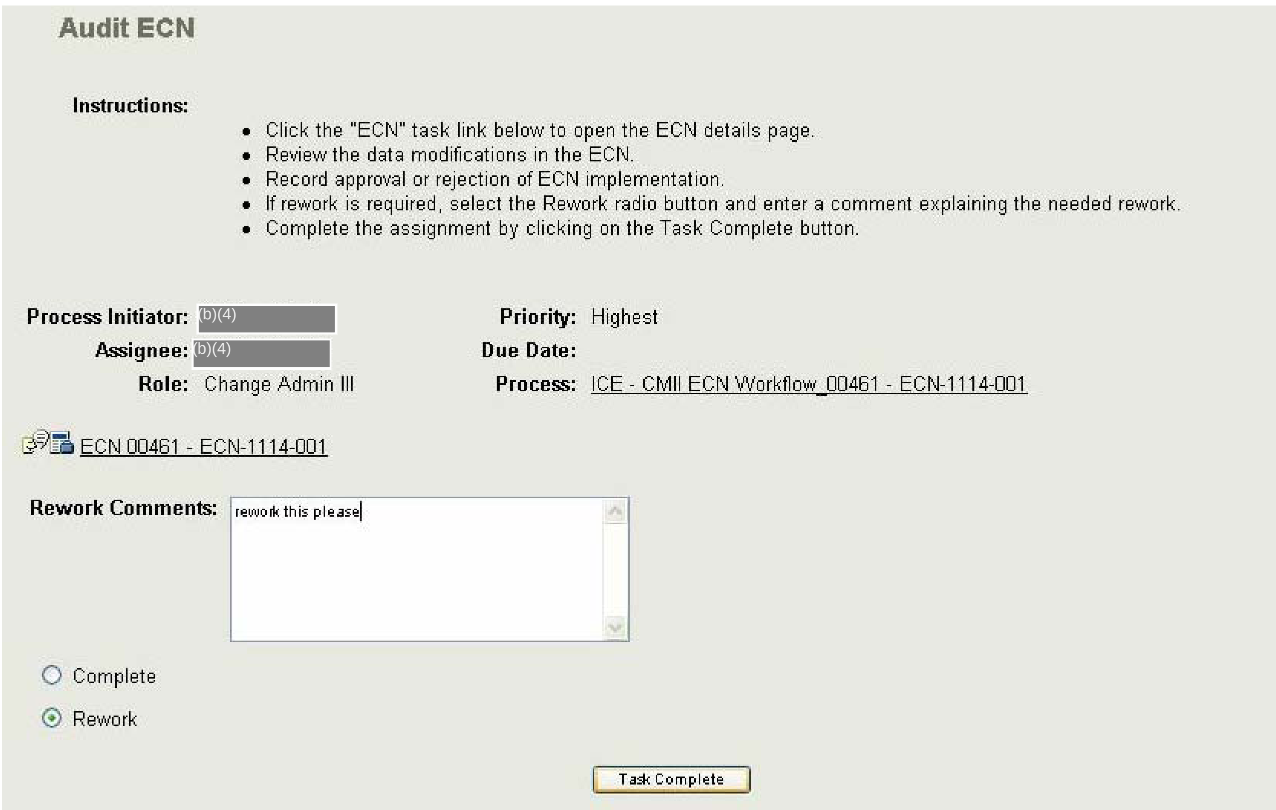
Return to ECN Process Matrix

"Audit ECN" Workflow Task

Responsible Role: Change Admin III (Receipt and Release Desk)

Review the ECN and the Implementation Plan tasks by clicking the ECN link in this workflow task and reviewing the ECN details and the documents in Resulting Items (if applicable). See "Accessing Implementation Plan Tasks from Details Page" and "Accessing Resulting Items from ECN Details Page" for detailed instructions.

Click the "**Task Complete**" button after recording complete/rework vote. This will complete the ECN workflow.

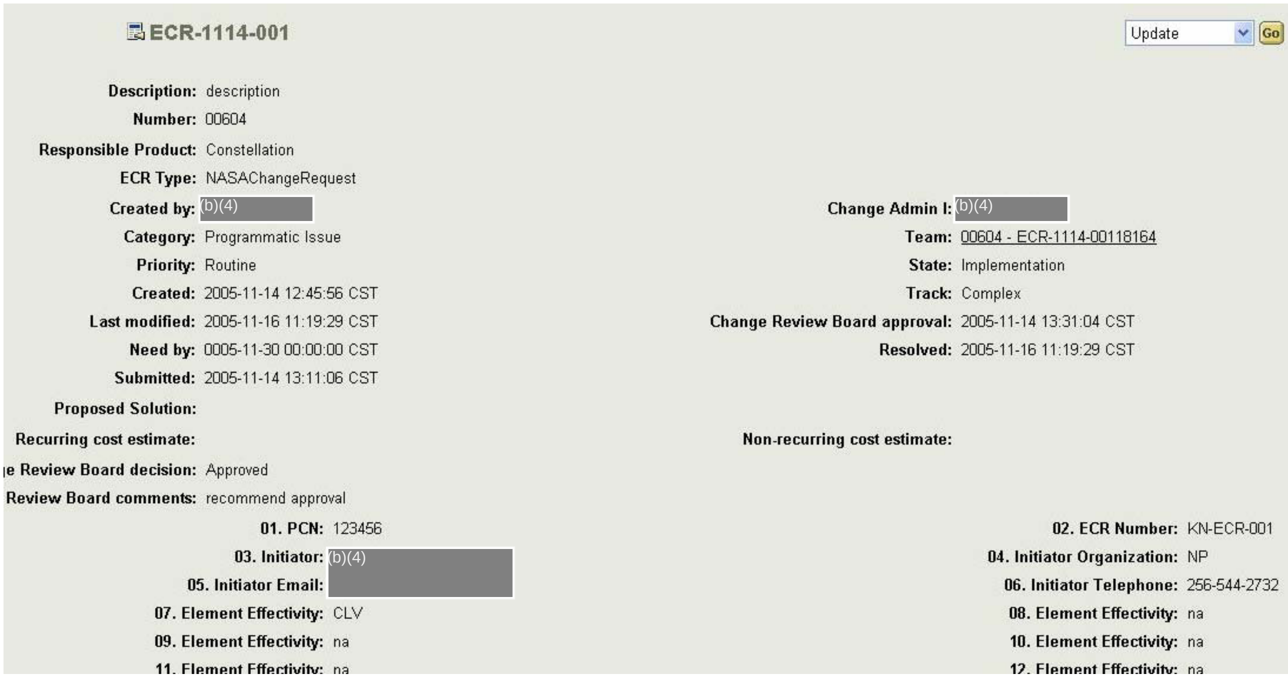


Return to ECN Process Matrix

Appendix: General Workflow Instructions

Updating ECR from ECR Details Page

On the ECN Details page, choose "Update" from the pull-down menu and click the "**Go**" button. Changes may be made to Description information. Affected Data and Attachments may be added, revised or removed.


ECR-1114-001 Update Go

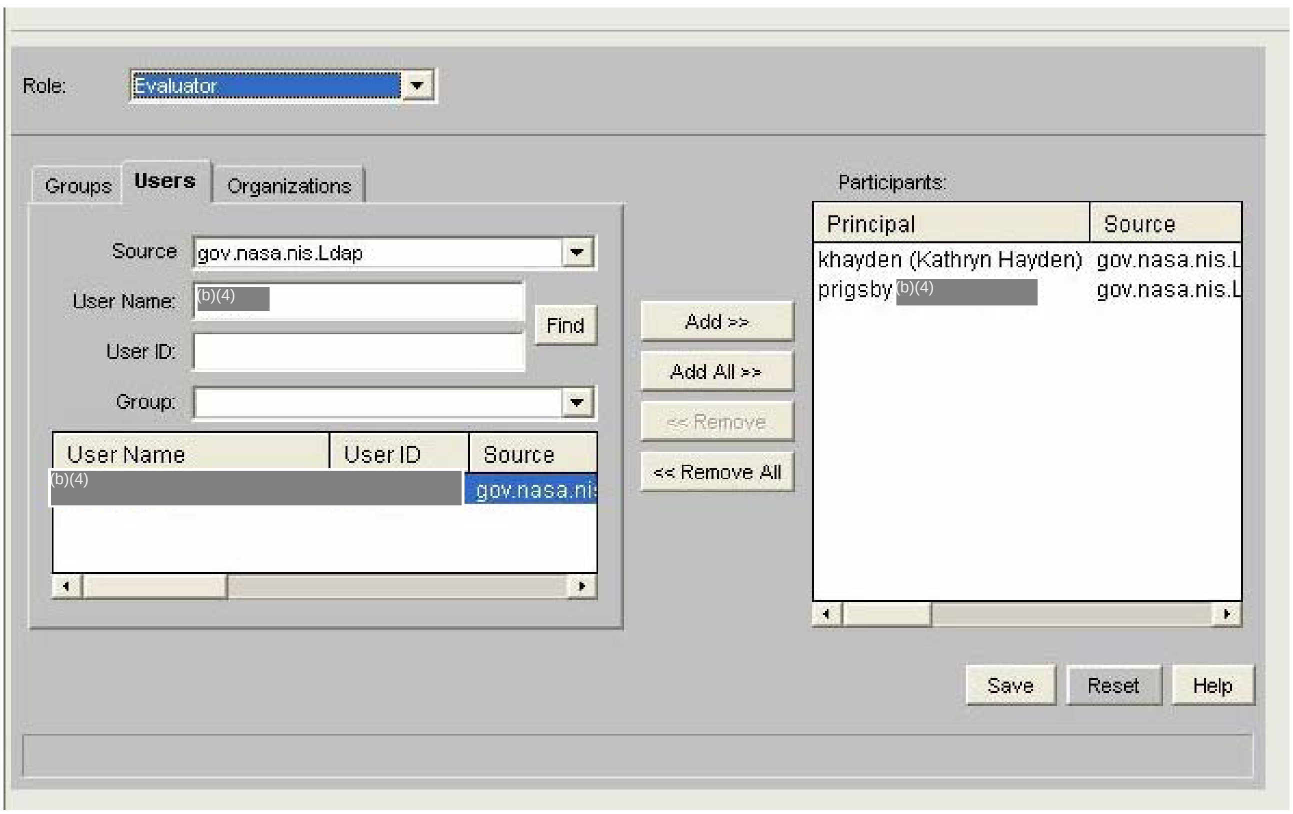
Description:	description		
Number:	00604		
Responsible Product:	Constellation		
ECR Type:	NASAChangeRequest		
Created by:	(b)(4) [redacted]	Change Admin I:	(b)(4) [redacted]
Category:	Programmatic Issue	Team:	00604 - ECR-1114-00118164
Priority:	Routine	State:	Implementation
Created:	2005-11-14 12:45:56 CST	Track:	Complex
Last modified:	2005-11-16 11:19:29 CST	Change Review Board approval:	2005-11-14 13:31:04 CST
Need by:	0005-11-30 00:00:00 CST	Resolved:	2005-11-16 11:19:29 CST
Submitted:	2005-11-14 13:11:06 CST		
Proposed Solution:			
Recurring cost estimate:		Non-recurring cost estimate:	
e Review Board decision:	Approved		
Review Board comments:	recommend approval		
01. PCN:	123456	02. ECR Number:	KN-ECR-001
03. Initiator:	(b)(4) [redacted]	04. Initiator Organization:	NP
05. Initiator Email:		06. Initiator Telephone:	256-544-2732
07. Element Effectivity:	CLV	08. Element Effectivity:	na
09. Element Effectivity:	na	10. Element Effectivity:	na
11. Element Effectivity:	na	12. Element Effectivity:	na

Use the "Back" button on the Web toolbar to return to previous location in this document.

Assigning Roles to Participants in Workflow Tasks

Choose the “Role” from the pulldown menu
Click the “Users” tab
Enter “User Name” or “User ID” in appropriate block (or partial entries, using “*” as wildcard)
Click the “Find” button
Click the correct user in the lower left-hand side of this screen
Click the “Add>>” button to assign this user to the “Role”
If any users need to be removed from the “Participants” table, click the name and then click the “<<Remove” button
Follow these steps for each of the Roles to be assigned in this task.
When complete, click the “**Save**” button to save role/participant assignments

NOTE: Participants must be members of this Product to be available for role assignment.

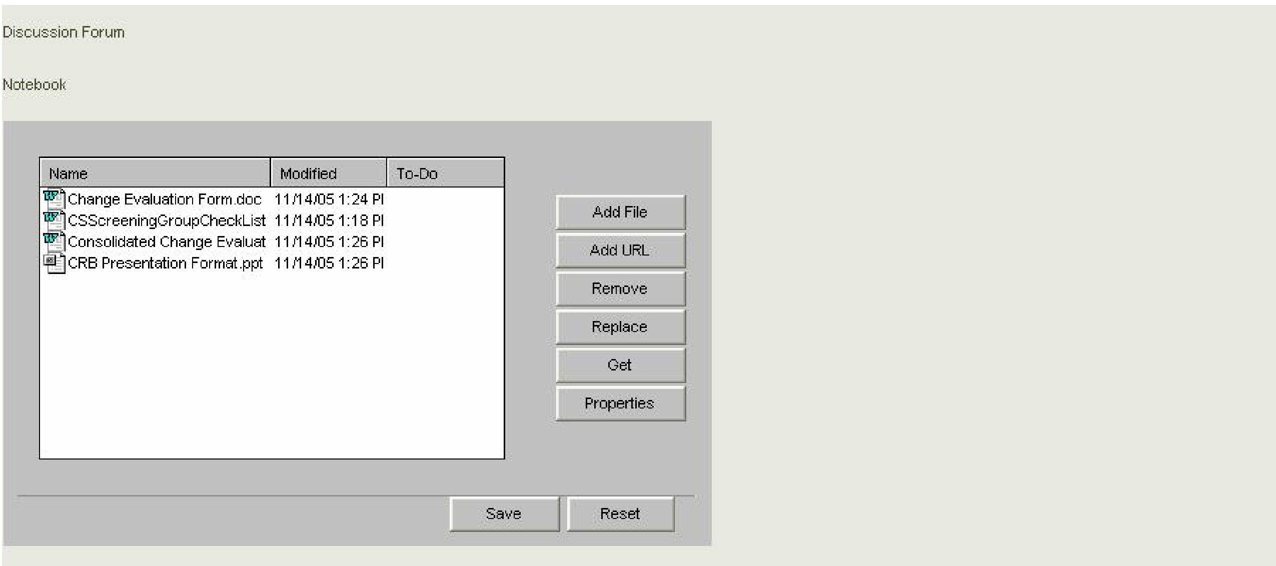


Use the “Back” button on the Web toolbar to return to previous location in this document.

Attaching Files into Workflow Tasks

In the "Add File" box at the bottom of the workflow task:

- Click the "**Add File**" button
- Browse to the file and click "Open"
- The file will appear in the list below with "ADD" in the "To-Do" column.
- Click the "**Save**" button to save the file to the workflow contents. NOTE: The file is not attached until you "Save" it.



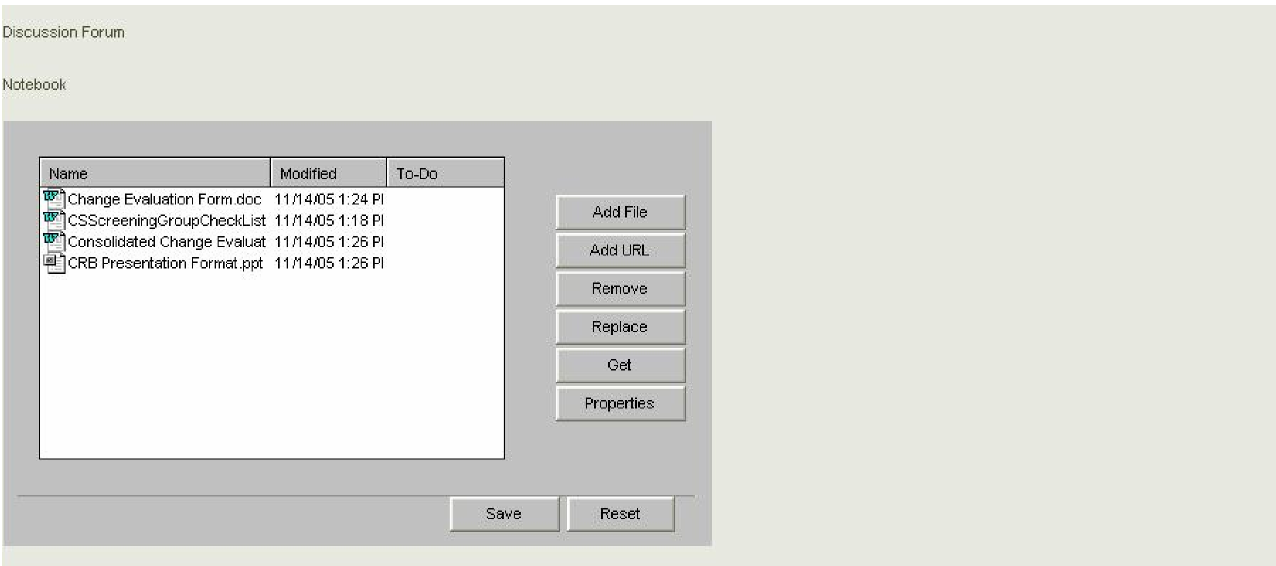
Use the "Back" button on the Web toolbar to return to previous location in this document.

Obtaining Attached Files from Workflow Tasks

In the "Add File" box at the bottom of the workflow task:

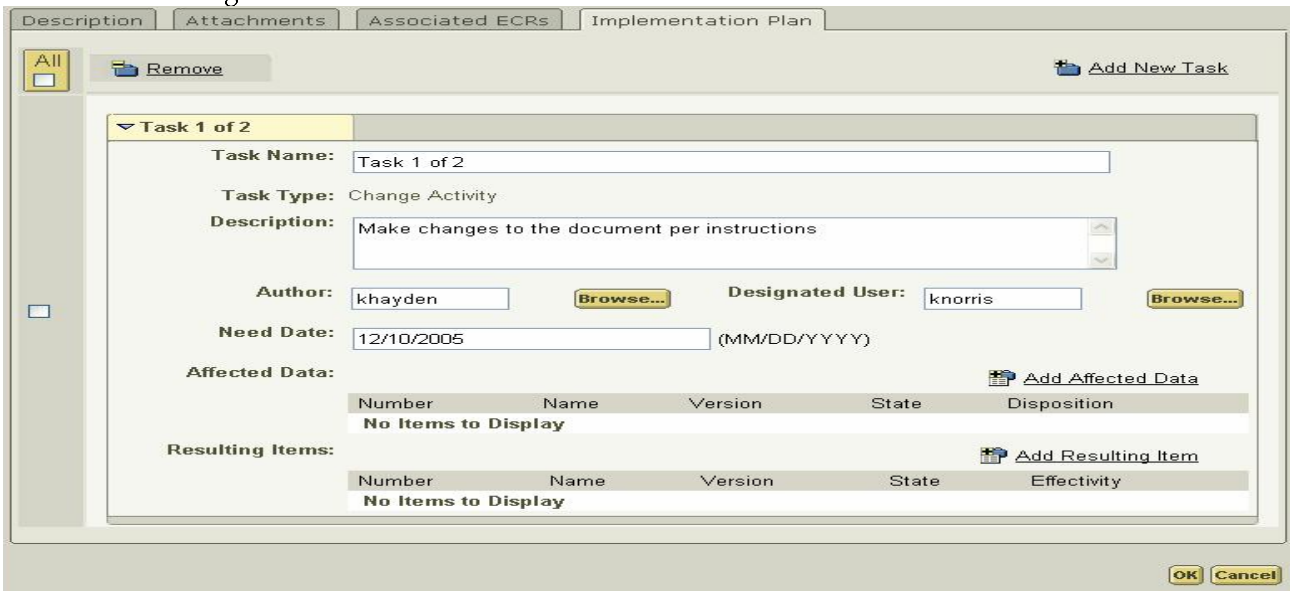
- Click the file name
- Click the "**Get**" button
- Choose "Open" or "Save File to disk"

NOTE: Files must be saved to disk before changes can be made to them. If changes are made to files with the "Open" option, the changes will not be saved.

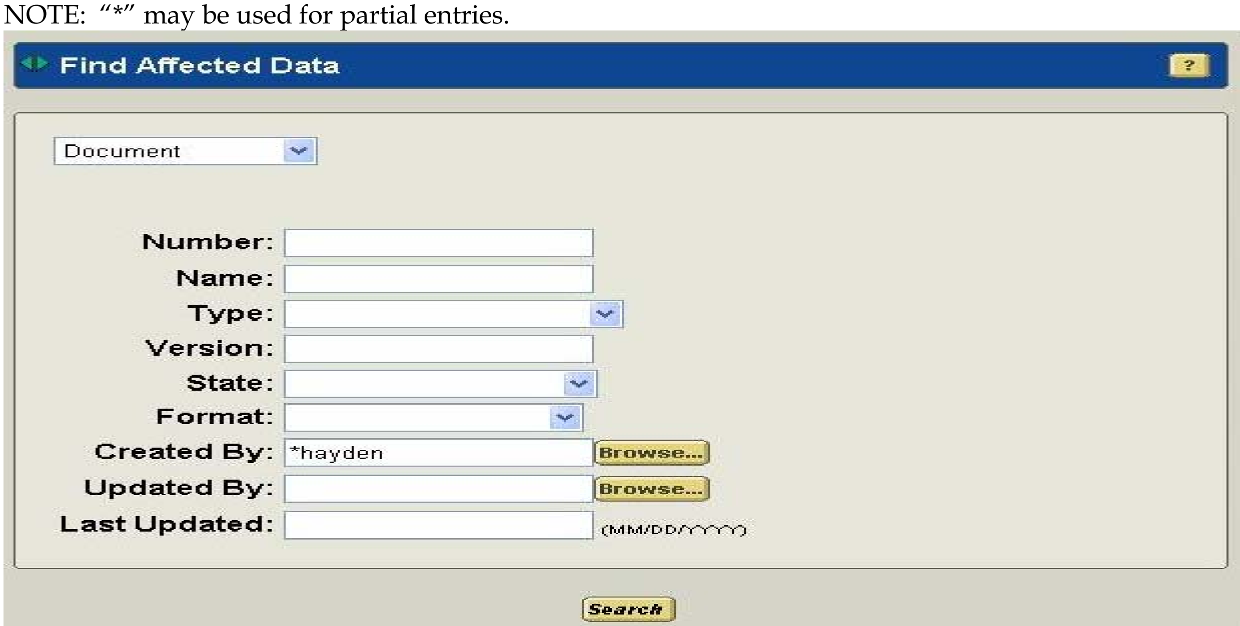


Adding Affected Data to ECN Implementation Plan Tasks

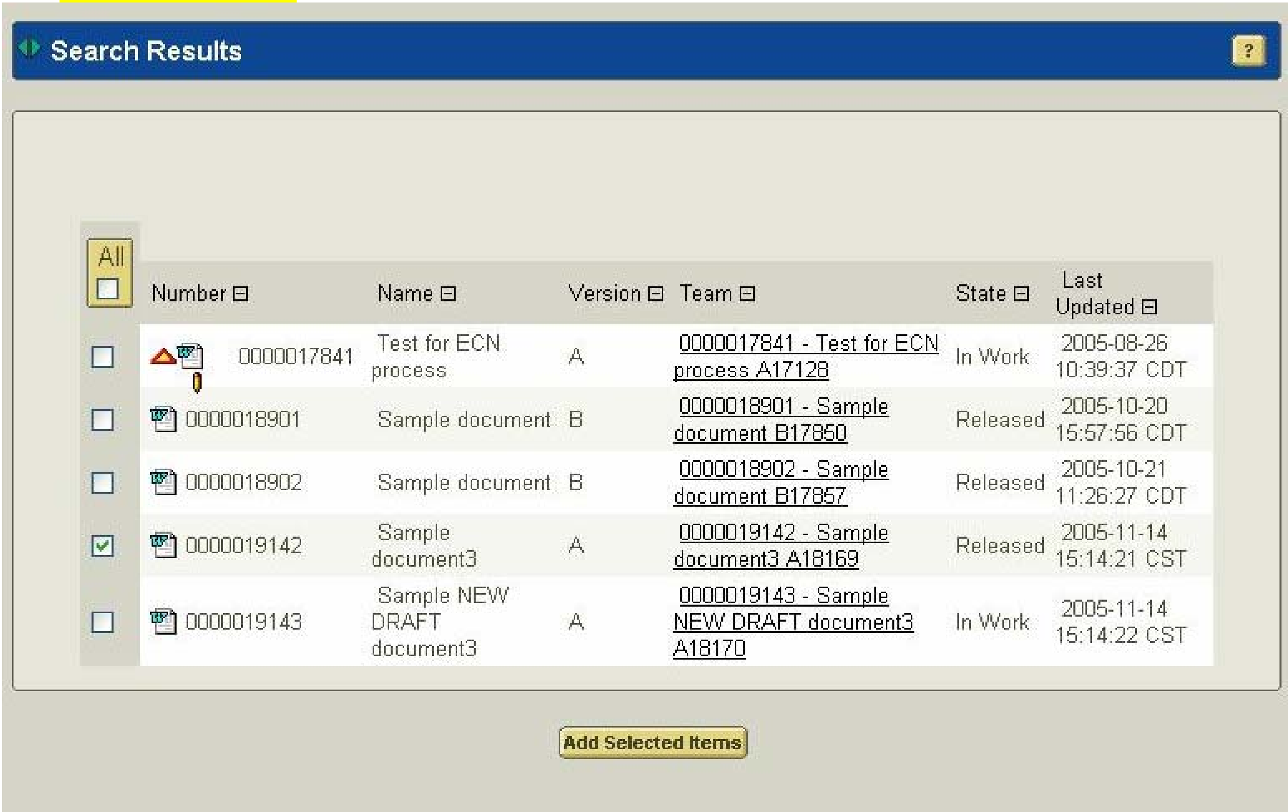
To add "Affected Data" to an Implementation Plan task, click the "Add Affected Data" link and search for the document using the fields on the "Find Affected Data" window.



Enter search criteria in one or more fields in this window and click the "**Search**" button.
NOTE: "*" may be used for partial entries.



Select the affected data from the “Search Results” window by checking the box next to each document. Click the “**Add Selected Items**” button at the bottom of the window.

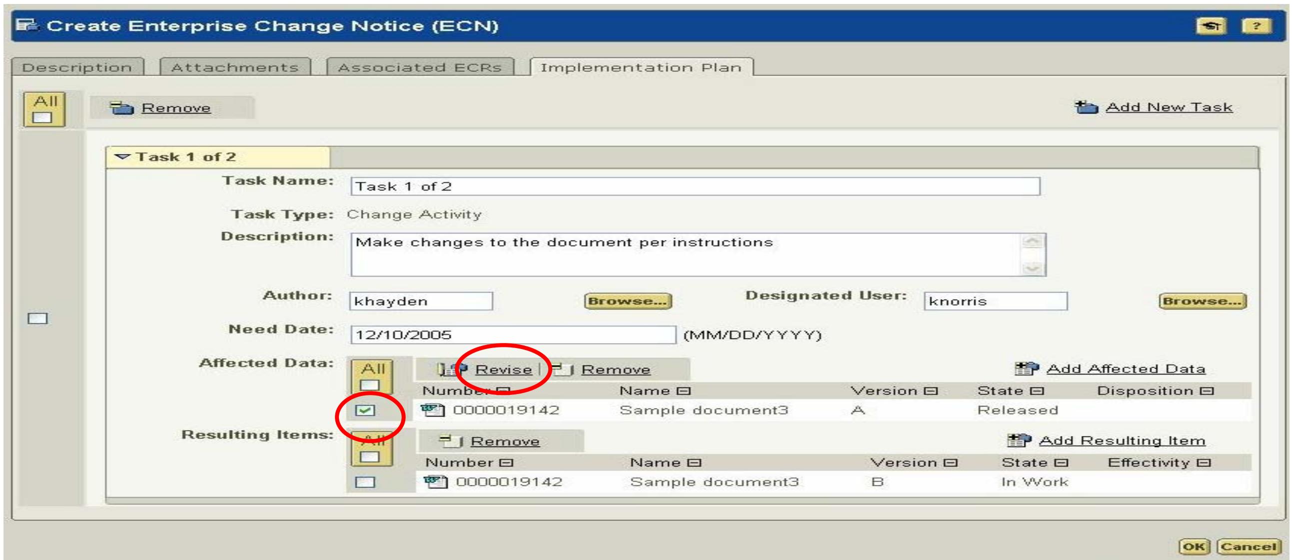


	Number	Name	Version	Team	State	Last Updated
☐	0000017841	Test for ECN process	A	0000017841 - Test for ECN process A17128	In Work	2005-08-26 10:39:37 CDT
☐	0000018901	Sample document	B	0000018901 - Sample document B17850	Released	2005-10-20 15:57:56 CDT
☐	0000018902	Sample document	B	0000018902 - Sample document B17857	Released	2005-10-21 11:26:27 CDT
☑	0000019142	Sample document3	A	0000019142 - Sample document3 A18169	Released	2005-11-14 15:14:21 CST
☐	0000019143	Sample NEW DRAFT document3	A	0000019143 - Sample NEW DRAFT document3 A18170	In Work	2005-11-14 15:14:22 CST

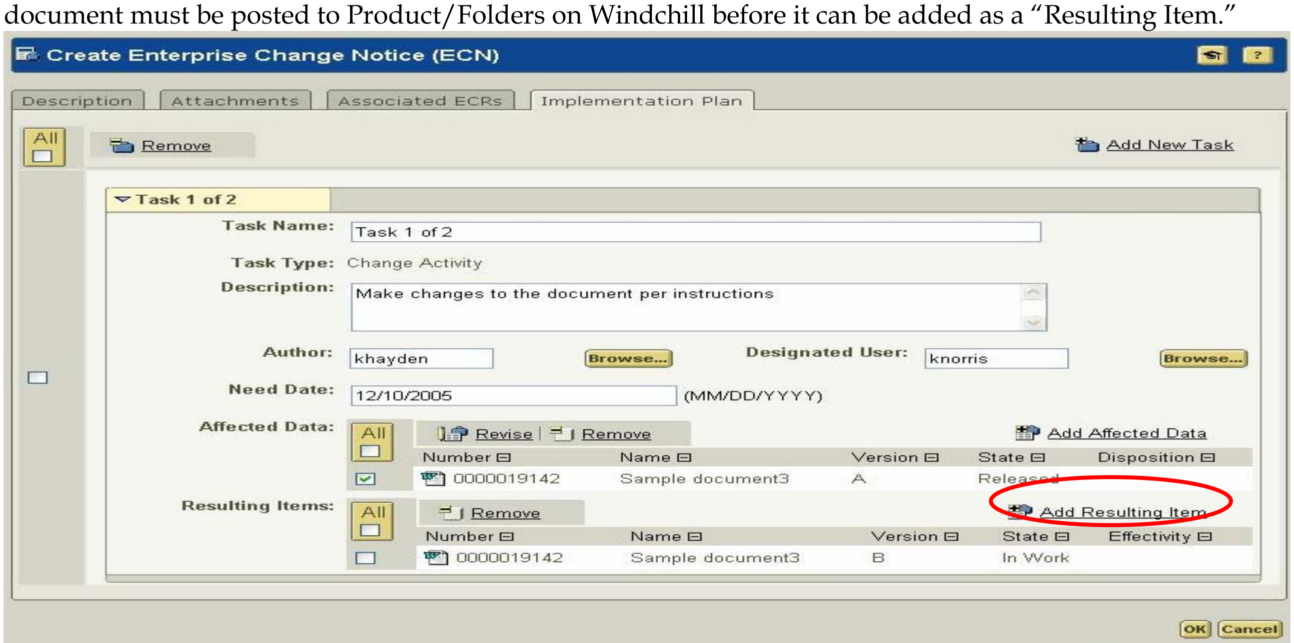
Adding Resulting Items to ECN Implementation Plan Tasks

To add “Resulting Items” to an Implementation Plan task, follow these instructions for adding revised or new documents as “Resulting Items.”

If the task is to revise an existing document, click the box next to the affected document and then click “Revise” at the top of the “Affected Data” table. A newer version of the affected document will now appear under the “Resulting Items” list. This newer version will be the version that is updated to complete this task. NOTE: The original affected document must be in the “Released” life cycle state.

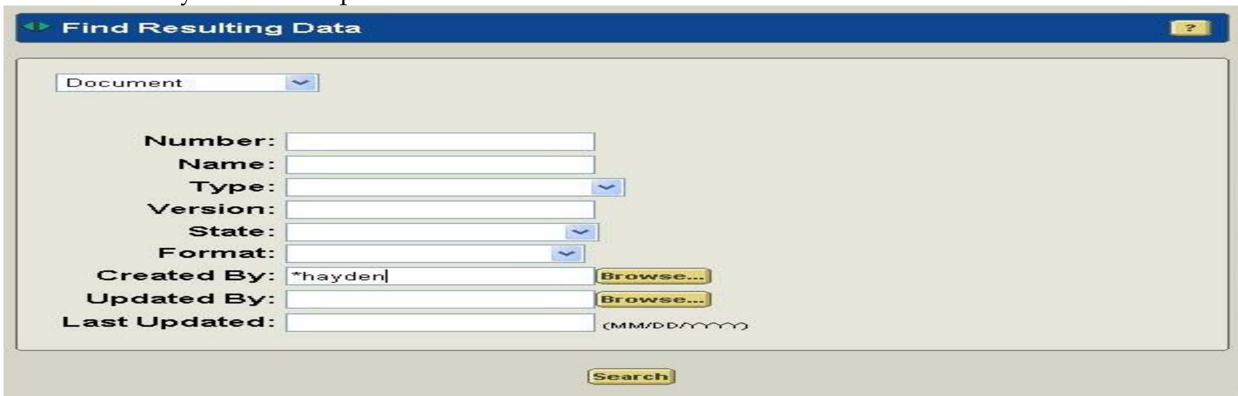


If the task is to develop a new document, click the “Add Resulting Item” link and search for the draft document using the fields on the “Find Resulting Data” window (next page). NOTE: A “Version A” of the document must be posted to Product/Folders on Windchill before it can be added as a “Resulting Item.”

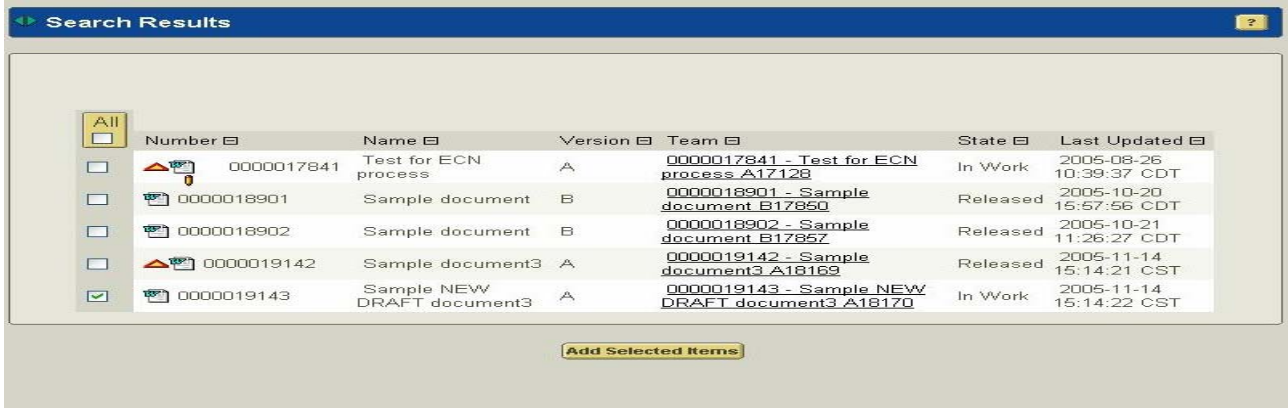


Use the “Back” button on the Web toolbar to return to previous location in this document.

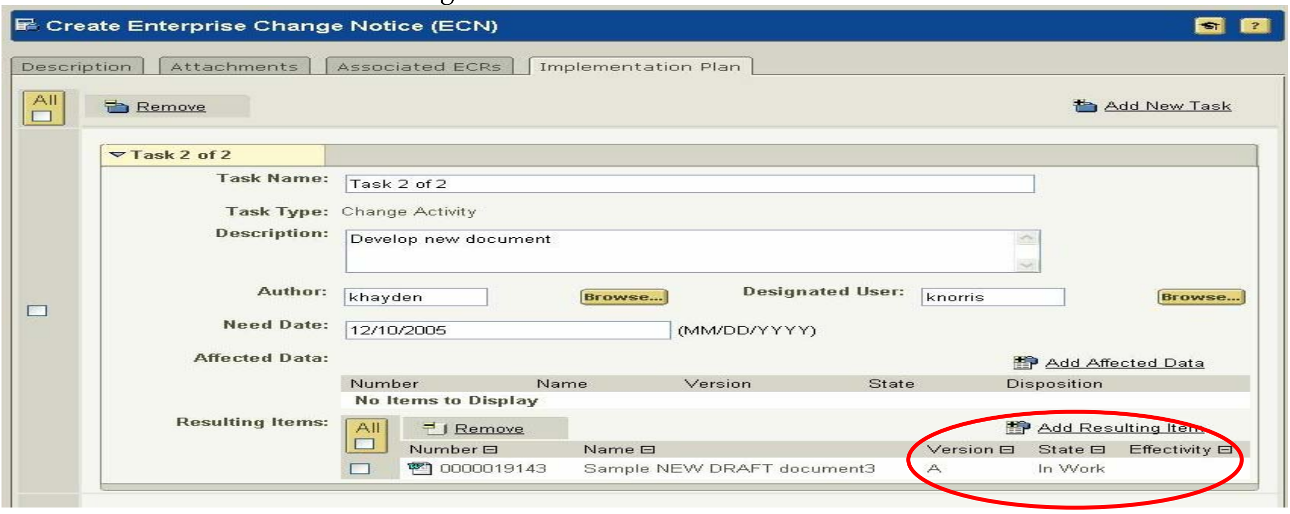
Enter search criteria in one or more fields in this window and click the "**Search**" button.
NOTE: "*" may be used for partial entries.



Select the document from the "Search Results" window by checking the box next to each document. Click the "**Add Selected Items**" button at the bottom of the window.



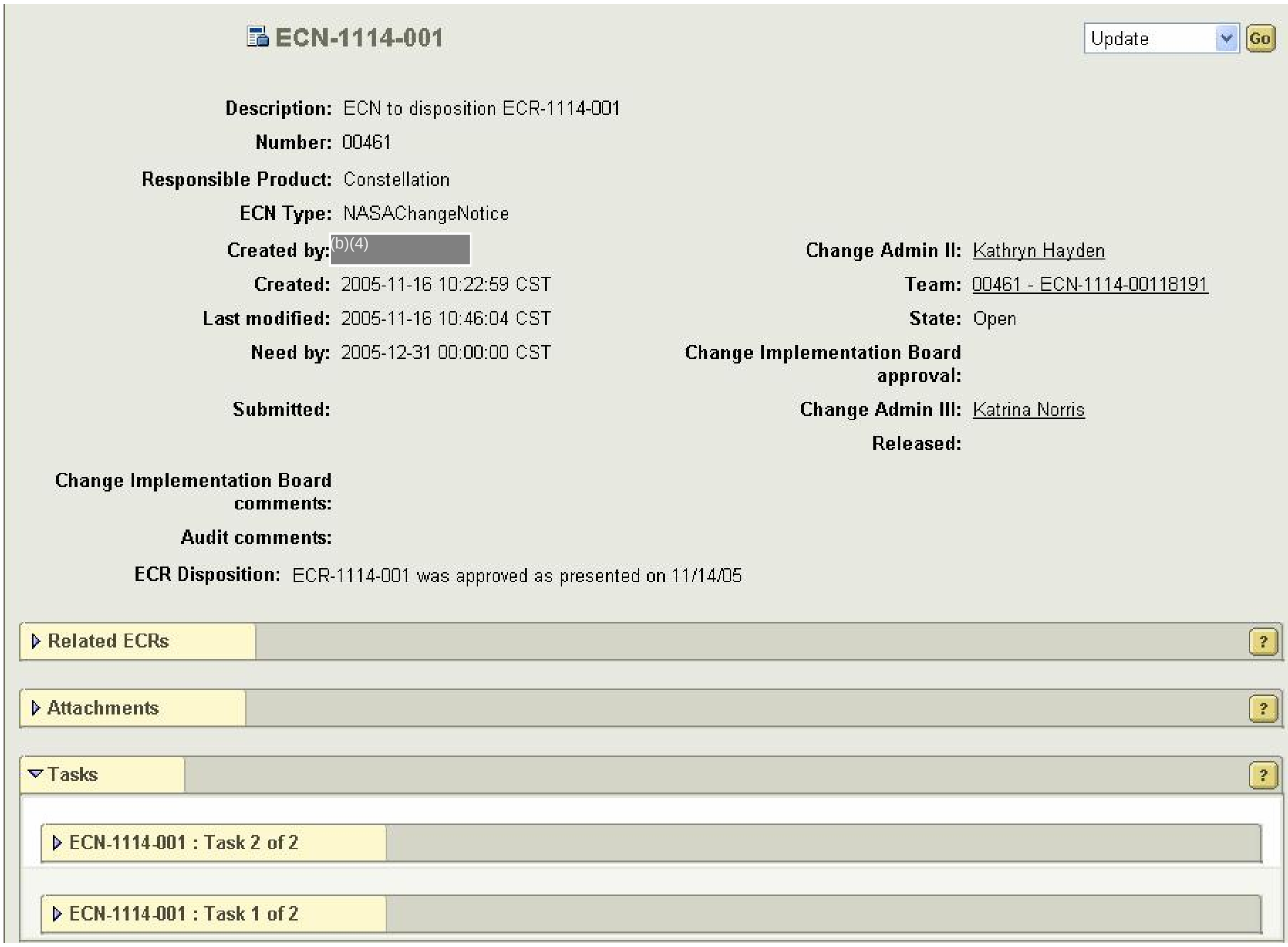
A "Version A" of the new document will now appear in the "Resulting Items" list. This version will be the first version of the document resulting from this task.



Use the "Back" button on the Web toolbar to return to previous location in this document.

Updating ECN from ECN Details Page

On the ECN Details page, choose "Update" from the pull-down menu and click the "**Go**" button. Changes may be made to Description information. Associated ECRs and Implementation Plan tasks may be added, revised or removed.

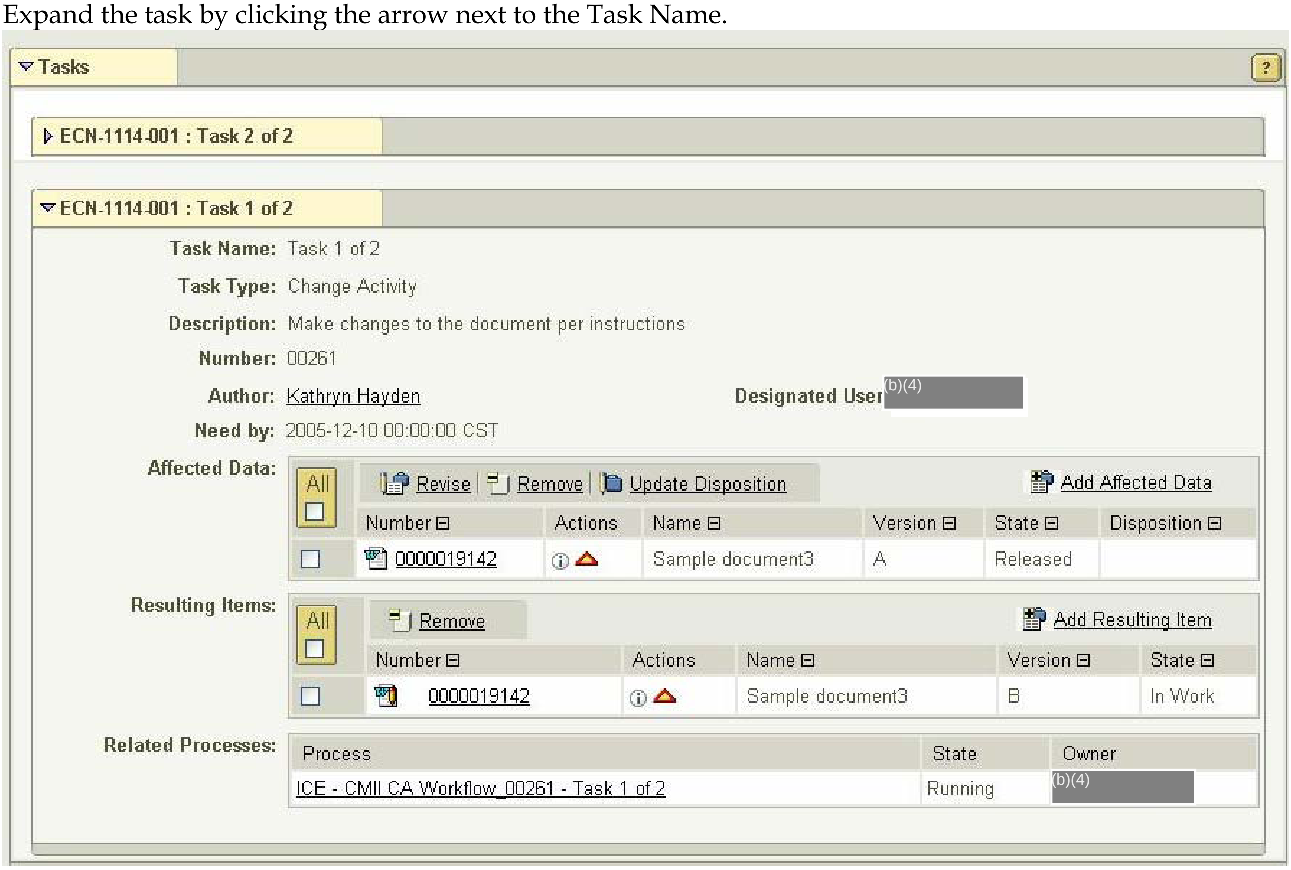


Use the "Back" button on the Web toolbar to return to previous location in this document.

Accessing Implementation Plan Tasks from Details Page

On the ECN Details page, scroll down to the "Tasks" section:

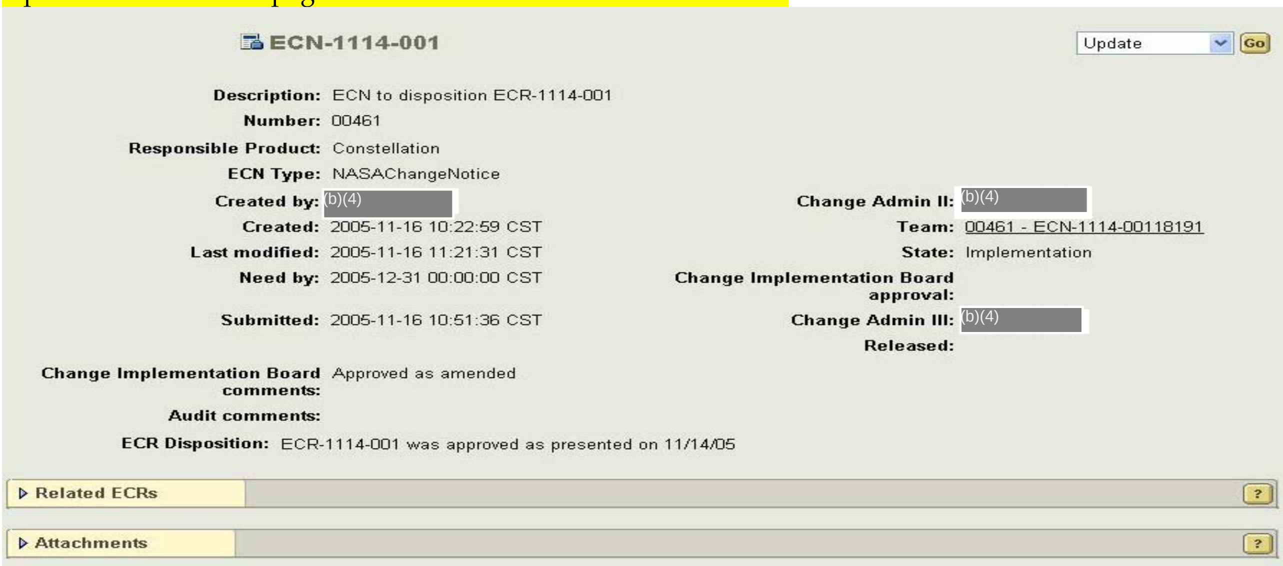
Expand the task by clicking the arrow next to the Task Name.



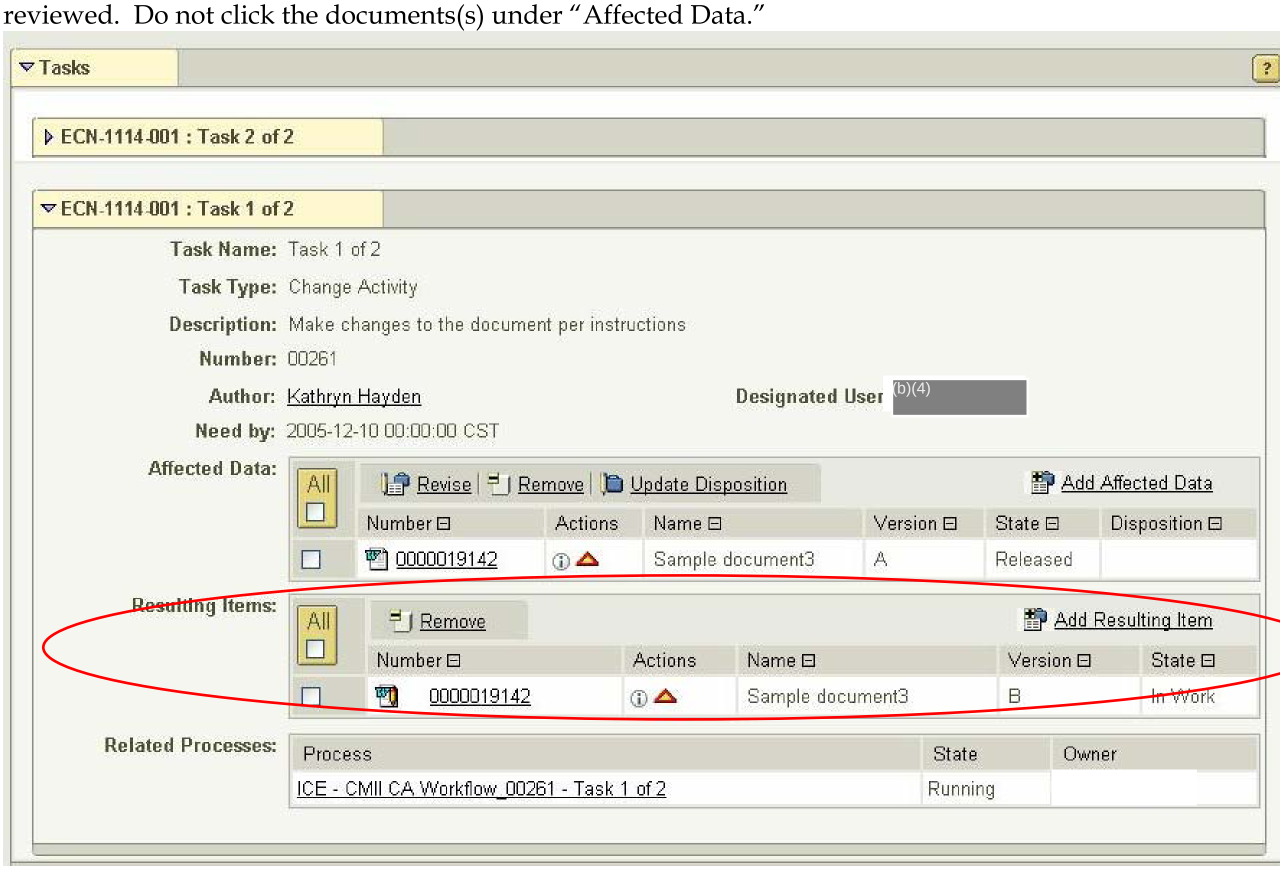
Use the "Back" button on the Web toolbar to return to previous location in this document.

Accessing Resulting Items from ECN Details Page

Open the ECN Details page and scroll down to the "Tasks" section



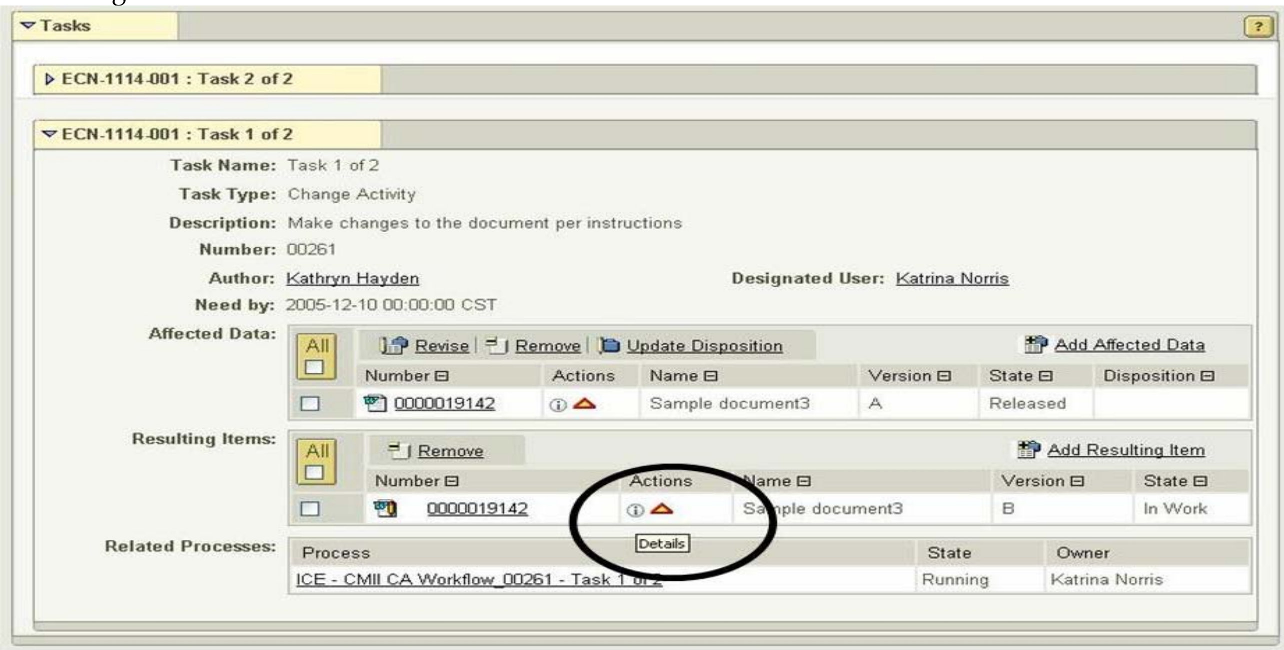
Expand the task by clicking the arrow next to the Task Name. Under "Resulting Items," click the corresponding link under "Number" to open the document. NOTE: Only "Resulting Items" should be reviewed. Do not click the documents(s) under "Affected Data."



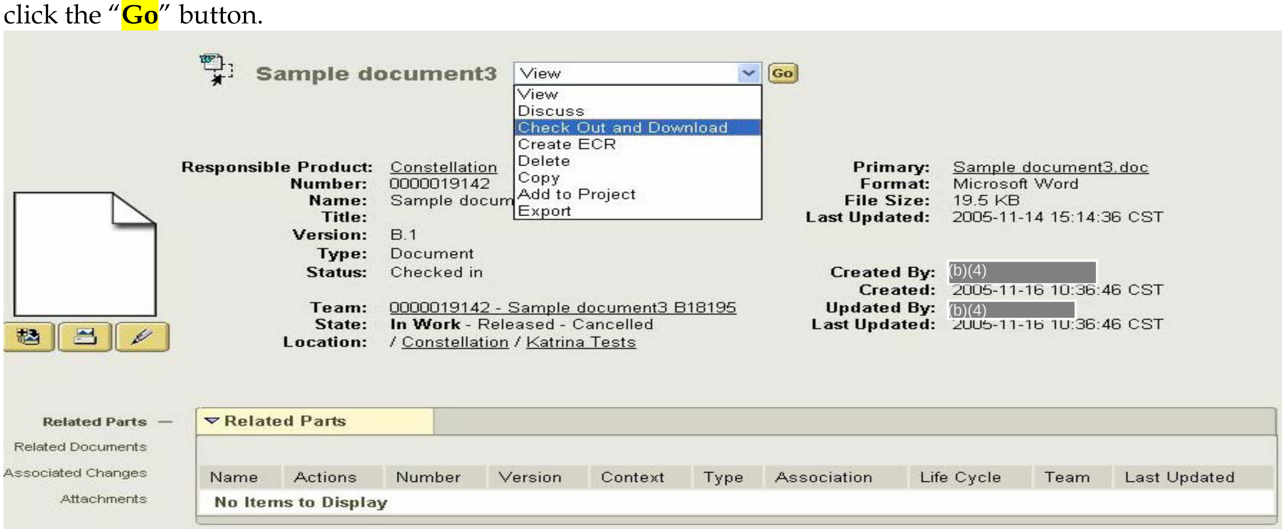
Use the "Back" button on the Web toolbar to return to previous location in this document.

Updating Resulting Items

On the ECN Details page, expand the appropriate task. Click the circled "i" icon next to the document under "Resulting Items."



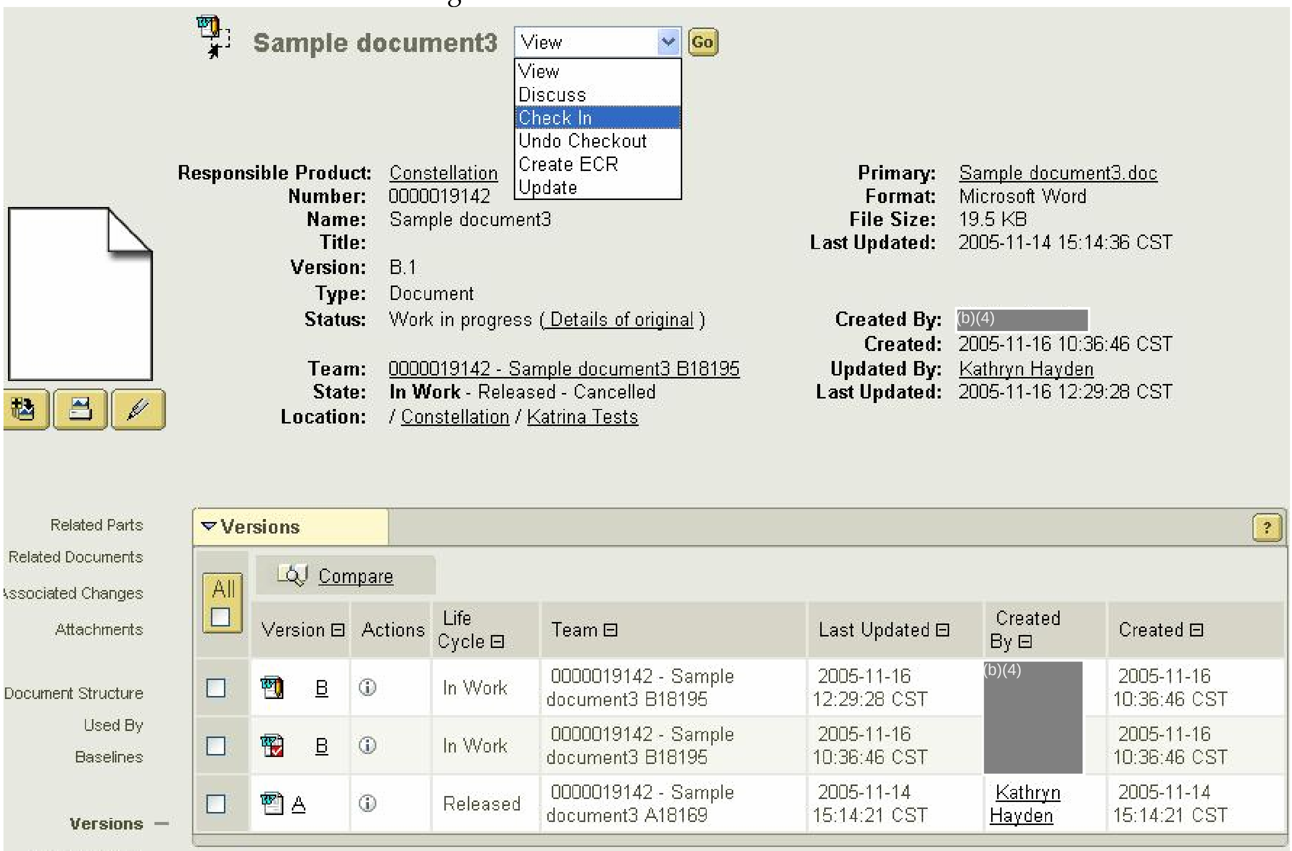
On the "Resulting Item's" Details page, choose "Check Out and Download" from the pull-down menu and click the "**Go**" button.



Save the file to your workstation to make changes. "Check in" document after changes are completed.

Use the "Back" button on the Web toolbar to return to previous location in this document.

After completing changes to the "Resulting Item" file, go to the "Resulting Item's" Details page, choose "Check In" from the pull-down menu and click the "**Go**" button. Windchill will browse to the location to which the file was downloaded during "Check Out and Download."



Use the "Back" button on the Web toolbar to return to previous location in this document.